Systemic reform: The impact of North Carolina's state-initiated policies on local gifted programs

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SYSTEMIC REFORM: THE IMPACT OF NORTH CAROLINA'S
STATE-INITIATED POLICIES ON LOCAL GIFTED PROGRAMS

A Dissertation
Presented to
The Faculty of the School of Education
The College of William and Mary in Virginia

In Partial Fulfillment
Of the Requirements for the Degree
Doctor of Philosophy

By
Elissa F. Brown
April, 2001
SYSTEMIC REFORM: THE IMPACT OF NORTH CAROLINA'S
STATE-INITIATED POLICIES ON LOCAL GIFTED PROGRAMS

by

Elissa F. Brown

----------------------------------------

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David W. Leslie, Ed. D.
DEDICATION

To my father, Gilbert R. Weisner, who continues to inspire me in his death as he did in his life.
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SYSTEMIC REFORM: THE IMPACT OF NORTH CAROLINA’S STATE-INITIATED POLICIES ON LOCAL GIFTED PROGRAMS

ABSTRACT

This study considered the impact of North Carolina’s reform policy for gifted education (Article 9B) on local school districts’ gifted programs. Additional considerations were brought forward with regard to how educational changes made in local gifted programs were related to other state-initiated reform efforts. The study was conducted in three phases: Phase I was a statewide survey to the total population of persons in charge of overseeing local gifted programs. Phase II was telephone interviews conducted with 11 respondents from the statewide survey sample (N=71). Phase III was a researcher-selected focus group session whose members represented contextual layers from Talbert and McLaughlin’s (1993) conceptual framework.

The data strongly suggest that there has been a conceptual shift in gifted education in North Carolina into the fabric of general education and away from special education. This conceptual change has been operationalized at the school district level through changing services to gifted students, providing for professional development, emerging awareness of gifted needs from multiple stakeholder groups, changing personnel roles defining responsibility for meeting the needs of gifted learners, and allowing for local ownership and authority for implementation efforts. Secondly, North Carolina’s school reform initiative for accountability, ABC’s, has impacted the implementation of North Carolina’s school reform initiative for gifted education (Article 9B), and due to the emphasis on testing from the ABC’s, the ability to do anything meaningful and sustainable with gifted students by implementing Article 9B has not occurred. Implications for further research, policy, and practice are discussed.

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SYSTEMIC REFORM: THE IMPACT OF NORTH CAROLINA'S
STATE-INITIATED POLICIES ON LOCAL GIFTED PROGRAMS
CHAPTER 1
Introduction

School reform is in a state of flux. Over the past two decades, state educational policies have been defined by increasing political and popular pressure to raise academic standards and increase achievement among all students in the United States. Currently, states are creating wide-ranging and sometimes controversial policies that impact curriculum, assessment, accountability, personnel development, finance, and governance (Goertz, McLaughlin, Roach, & Raber, 1998). These state reform efforts are shaped by individual state characteristics, including demographics and wealth distribution as well as traditional patterns of state versus local control. Moreover, school reform efforts have frequently emerged in response to a specific educational need and reflect, in large part, the thinking and educational practices already underway in portions of the society (Spillane, 1998).

With the development of national curriculum standards, local school districts are responding to the push for all students to learn at higher levels. School districts are constantly interpreting, implementing, and defining ways in which they can improve pedagogy and curriculum. Many reform efforts strive to apply the same high standards to all students, including those identified as gifted learners. Since the intent of school reform is to raise standards for all learners, a need for clarifying the goals, purposes, services,
and programming for gifted learners has been heightened (Treffinger, 1991; Van Tassel-Baska, 1991). Research is needed to examine school reform policies’ impact on gifted programs as one benchmark for measuring school reform efforts at establishing higher standards and educational change. Programs for the gifted are embedded in school system decisions surrounding curriculum, instruction, and assessment. Educational provisions for the gifted are an integral part of the overall school program.

The school system is more than a set of bureaucratic layers designed to transmit educational goals. The existence of a positive, affirming, district level central office community makes a critical contribution to teachers’ sense of professional identity, motivation, and willingness to undertake challenges. In research conducted by the Center for Research on the Context of Secondary School Teaching (CRC) from 1987-1992 in California and Michigan, teachers’ assessments of district-level support ranged from hostile and demoralizing to strong and supportive (McLaughlin & Talbert, 1993). Even a strong principal and active school community could not entirely counteract the negative influences that marked a negative perception of district level support. The relationship between teacher and district generates powerful influences on teachers and teaching apart from governance structures (McLaughlin & Talbert, 1993). Policy espoused from the district level does have the potential to shape educational practice.

Although state-directed school reform efforts affect aspects of local school districts’ programming for their diverse student bodies, one area of programming that has a paucity of literature is the extent to which state-initiated reform efforts impact local school districts’ programming for gifted students. The underlying assumption of school
reform efforts and state academic standards is maximum levels of achievement with an eye toward excellence—an attempt to raise the standard for all learners (Passow, 1989; Van Tassel-Baska, 1997). Studying the impact of school reform efforts on gifted programming provides meaningful insight into the analysis of expectation levels for excellence (Robinson, 1996). “Programs for gifted and talented students have served as laboratories of innovation in educational practice” (United States Department of Education [USDOE], 1993, p. 23). State-directed reform efforts should include educational provisions for the gifted as an integral part of the overall school agenda to enhance and strengthen education, so that the responsibility for educating the gifted shifts from a solitary person to the school system (Passow & Rudnitski, 1994). State-directed reform efforts represent attempts to change educational practice in order to provide opportunities for students to achieve maximum outcomes. Gifted education has frequently been perceived as representing the best in educational practice (United States Department of Education [USDOE], 1993). One benchmark for measuring the impact of reform efforts is to consider changes in school systems’ programming for gifted learners. Programs for the gifted are typically established at the school system level for the range of K-12 gifted learners. Implementation of gifted programs occurs between schools, and within schools, but policies, reform directives, and goals are transmitted and disseminated district-wide. Conducting research on gifted programs from a district-wide perspective would yield a deeper understanding of the context of implementing reforms.

The Waves of Educational Reform

The impetus for the first wave of educational reform in the 1980s began with the
publication of *A Nation at Risk* (National Commission on Excellence in Education, 1983) and consisted of state efforts focused on broad-sweeping reforms such as increased graduation requirements and statewide student testing. This first wave of reform efforts has been criticized as disconnected approaches to education reform (Cohen & Spillane, 1992) because it avoided complex issues about the nature of teaching and learning and of change. Furthermore, it was an additive approach aimed at top-down control of public education. For example, when numerous states increased graduation requirements, no attention was paid to the fact that many teachers lacked the prerequisite skill base to teach the curriculum thus entailed. Even though excellence in teaching or the acquisition of rigorous content was espoused, the additive effects of this first wave of reform efforts in the 1980s did not support or encourage schools. Many of these state education initiatives were offensive to educators, but were politically motivated and consequently enacted with little difficulty (Fuhrman, Clune, & Elmore, 1988).

In response to changes from the first wave of reform, a second wave of reform efforts undertaken in the late 1980s focused on the organization and governance of schools (Elmore, 1987). Known as restructuring, this wave resulted in a shift toward decentralization, wherein local educational agencies were given more control over managing their schools. Efforts such as site-based management, more parental involvement, and teacher professionalism were the result of this wave. Schools were asked to adapt to changes that were respectful of the local context (Elmore & McLaughlin, 1988). Restructuralists from this reform effort argued that educational reform must come from the bottom up as opposed to the earlier top down efforts in the...
first wave. Although examples exist of successful restructured schools, the sum

evaluation of this wave has described its effects as fragmented, uncoordinated, and
generally not encouraging of higher level teaching or learning (Clune & White, 1988;

Analyses of the two waves of reform efforts over the past two decades have led

researchers, educators, and state policy makers to adopt a new policy approach known as

systemic school reform to attempt to bring about the depth of change needed to truly

reform schools. Systemic reform is designed to align ambitious student-outcome goals

with coordinated state and local policies (Smith & O'Day, 1991; Hertert, 1996).

The systemic school reform effort differs from the previous reform efforts because

it strives to reform the education system as a system, working for coherence across the

system's components. This approach favors a hybrid top-down, bottom-up approach, one

that combines state-level control for education with local-level initiative and

responsibility. Systemic school reform ultimately impacts the entire school system

because coherence is achieved between existing practices and new strategies for

implementation (Fuhrman, 1993). For example, if a state implements state-wide

assessment to determine levels of student achievement, then curriculum development,
textbook alignment, and the necessary teacher preparation would be redesigned to support
the ultimate outcome in ways that will enable students to learn.

To what end has this alignment been put into place for gifted learners? How can

reference be made at the state level for ambitious student outcomes and at the local level

for new strategies for implementation without regard to those learners who make
subsequent contributions to the nation's prosperity and provide the United States with a competitive edge in the international market (Cox, Daniel, & Boston, 1985; Fetterman, 1988; Whitmore, 1988)? Systemic reformers claim that a coherent and supportive policy context can be established at the top of the system and that such a context will support and leverage the bottom-up redesign of schools (Lusi, 1997). Systemic reformers must leverage top-down policy impact with bottom-up changes. They surmise that higher levels of student achievement can be achieved for all students using this approach.

Even though many states have adopted systemic school reform in an effort to forge more coherent policy, The Consortium for Policy Research (1996) noted that the emphasis of states' initiatives has been on structural changes and finance issues rather than high-quality instruction. Nevertheless, the report cites states and school systems that have demonstrated changes in practice, attitude, and student achievement, although these achievements have been uneven. More research is needed to flesh out the effects of systemic reform initiatives due to the mixed research findings on educational changes.

From 1973 through 1978, under the sponsorship of the U.S. Office of Education, the Rand Corporation carried out a national study of four federally funded programs. This study examined federal-level attempts to stimulate change in local educational practices. Rand found that effective projects were characterized by a process of mutual adaptation rather than a uniform implementation, and that local factors dominated project outcomes (Rand, 1978). McLaughlin (1991) reviewed the Rand Change Agent Study ten years after subsequent implementation had occurred and concluded that "implementation continues to dominate outcome" (p. 147). By paying close attention to the implementation of
policy, attention is drawn to the relationship between a systemic reform initiative and the immediate context of its enactment. Considering the implementation of state enacted policy on local gifted programs would shed light on the impact of educational change.

Context of School Reform in North Carolina

The current reform movement in North Carolina is linked to previous efforts over the past two decades. Through a series of legislative and policy initiatives, North Carolina has been reforming public school education in order to improve student performance throughout the state along three strands: accountability, program equity, and standards.

North Carolina began reform efforts, along with many other states, partly in response to A Nation at Risk, low ranking Scholastic Aptitude Test (SAT) scores and a concern for the state's future economy. In 1984, a commission on Education for Economic Growth prepared the first reform agenda. Included in the report were pay increases, a career development pilot program for teachers, and establishment and funding for a "Basic Education Plan." The same year that the Basic Education Plan was enacted as state policy, the Creech Bill was adopted. This bill categorically placed gifted education within special education, affording gifted programs similar fiscal and legal state protection to special education (see Table 1).

The next round of reform efforts occurred in the late 1980s and was guided by the North Carolina Public School Forum, comprised of business leaders, educators, and policymakers. The Forum produced a strategic plan for education entitled Thinking for Living: A Blueprint for Educational Growth (1988). This plan called for alignment of educational standards, curriculum, and assessment, as well as a strong system of
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accountability at the school building level. Provisions were made for deregulating state control and shifting the basis of control to the local level, stronger training for principals and teachers, increased attention to early childhood programs, and accountability tying teacher career development pay to student performance based upon publishing school report cards. The North Carolina Standard Course of Study (NCSCOS), a curriculum framework establishing benchmarks of competence for each grade level and content area; the End-of-Grade (EOG) and End-of-Course (EOC) testing program; and the Career Development Plan (CDP) are state policy reform actions resulting from this report. In the summer of 1993, as an extension of the NCSCOS, selected administrators and teachers of gifted programs were brought together to create a companion document for gifted programs that extended the NCSCOS for the gifted. This document, The Curriculum Framework for Gifted Education, was a framework designed to support and enrich the regular educational program. This framework provided guidance to all teachers in developing a differentiated curriculum for gifted learners by providing examples of strategies for modifying the regular content.

In the same year that The Curriculum Framework for Gifted Education was approved for dissemination by the North Carolina State Department of Public Instruction, the General Assembly commissioned a report to determine the extent of cultural diversity within gifted programs and numbers of students served in gifted programs. The report, Cultivating Potential, spearheaded by Dr. Carolyn Callahan from the University of Virginia, called for the establishment of model sites to address its recommendations. In the spring of 1994, the State Board of Education approved the report’s recommendations and established nine model sites, reflecting geographic as well as economic diversity.
These model sites were to showcase a different identification protocol for gifted, aimed at reflecting a more accurate picture of the school system's student population, an array of educational services, and measures of local accountability.

Due to the apparent success of the model sites, in the summer of 1996, the North Carolina General Assembly passed a separate section under Article 9 of Chapter 115C of the General Statutes, Article 9B (see Appendix A). It called for the establishment of local plans for gifted education in every school division in North Carolina to be phased in over three years. The 1999-2000 academic year marked the final year for all school systems to develop and implement a local plan for gifted education. This research study established a base upon which to describe the impact of educational changes made in gifted programming since Article 9B was enacted.

North Carolina continues to develop new agendas for educational reform within general and gifted education. Recent initiatives include teacher-pupil ratio reductions, Smart Start (a program directed at early childhood), teaching fellows program (a coordinated effort with higher education institutions to recruit and retain quality teachers through salary incentives), and increased state revenues to local school systems. Has establishing this infrastructure of support for educational reforms worked? According to the 1998 National Education Goals Panel annual report (Grissmer & Flanagan, 1998), North Carolina was one of only two states that made significant and sustained academic achievement gains. The other state posting significant growth gains was Texas. North Carolina posted the largest average gains on the National Assessment of Educational Progress (NAEP) administered from 1990 to 1997. Interestingly enough, factors commonly associated with student achievement—real per pupil spending, teacher/pupil
ratios, teachers with advanced degrees, and experience levels of teachers—do not appear to explain the test score gains. "The study concludes that the most plausible explanation for the test score gains are found in the policy environment established in each state" (Grissmer & Flanagan, 1998, p. i).

**Conceptual Framework**

North Carolina's school reform agenda and, in particular, gifted education reform initiatives represent a systemic approach to reform, which fosters coherence in disparate elements of the education system. Students today bring different cultures, languages, attitudes and support to the classroom. Teachers agree that students have the greatest impact on what teachers do in the classroom (McLaughlin & Talbert, 1993). Teachers' responses to the challenges presented by their students and, by extension, to local and state policies vary substantially among and within schools. It is within this context that considering the simultaneously interdependent nature of multiple variables allowed the researcher to capture the interplay of reform initiatives, policy implementation, and educational changes which occur in local programs for the gifted.

Viewing the impact of systemic reform on gifted programs through the multiple contexts of Talbert and McLaughlin's (1993) conceptual framework has allowed this researcher to capture important variables across teaching contexts, state and school system reform initiatives, community cultures, and student composition. It also allowed this researcher to understand the interplay of these contexts in day-to-day practice. Understanding multiple contexts requires a view of an interactive system that influences teaching practices. Talbert and McLaughlin's (1993) multiple and embedded contexts of teaching framework (Appendix B) was constructed based upon a three-year study, begun...
in 1987, to explore the effect of particular contexts of schooling on educational outcomes and to provide a comprehensive look at how context conditions affect teaching and learning. The researchers sampled two states, Michigan and California, with input from nearly 900 teachers, from 16 high schools in 4 metropolitan areas. Additionally, they analyzed national survey data from the High School and Beyond Study (1984), and the National Educational Longitudinal Study (1988). Their research focused on the bottom-up teacher's perspective within embedded contexts. Teachers' perspectives consider teaching as an integrating activity. "The problem of systemic reform fundamentally is a problem of teachers learning how to translate enhanced curricula and higher standards into teaching and learning for all of their students" (Talbert & McLaughlin, 1993, p. 5).

As a result of their research, Talbert and McLaughlin (1993), created a conceptual framework to capture embedded contexts of teaching.

Teachers function within eight embedded contexts, each of which can constrain or enable teachers and, ultimately, success for students. The eight contexts are made up of formal and informal organizations and can only be understood within various nested contexts. Each layer represents a site for systemic reform. Working outward from a teacher's perspective are contextual influences that impact the lives of teachers and classrooms. The eight contexts from the teacher's perspective, are as follows:

- At the core of the framework is the classroom, consisting of the subject and students with daily sets of interactive personal demands.
- The next layer from the classroom is represented by the subject or content area, or in high schools, the department which defines the "what" of teaching.
- The third context from the center is the school organization. The research found that a
strong association exists between the level of support within the school community and teachers’ commitment to their students, subject, and school. This layer addresses school culture.

- The school system represents another embedded context. The relevance of the district context lies in the overarching sense of professional identity and inclusion. Teachers’ perspective on their district functioned to inhibit or enhance aspects of their specific school. For example, in one district Talbert and McLaughlin (1993) found that strong district-level support served to bolster teachers’ motivation in a weak department.

- Another context is the parent or community culture. Community values shape local educational goals and enshrine local traditions.

- Higher educational institutions represent the next context. Institutions of higher education are partners in K-12 education because they serve as catalysts for teacher preparation as well as another level of schooling for students entering academic arenas.

- The next context consists of the teachers’ professional affiliations, such as networks or associations. Strong professional contexts provide sustained learning for the teacher, a shared network of fellow teachers involved in similar activities, and participation in a larger cadre of shared values. Professional associations also serve as conduits for state education frameworks.

- The final context in the framework is the overall institutional environment, consisting of reform initiatives, norms of practice, and educational goals.

Talbert and McLaughlin’s (1993) embedded contexts of teaching provides this research study with an important framework because it underscores the complexities
of implementing local gifted policy in light of state-initiated reform efforts and views educational change as a non-linear, interactive process.

**Statement of the Problem**

Understanding multiple contexts requires a view of an interactive system that influences teaching practices. The ability of one variable to influence a teacher’s instructional goals and practices depends upon the conditions in which it is embedded. By ignoring the multiple contexts of teachers, researchers limit their understanding of policy implementation by reducing their findings to particular variables in specific settings rather than examining and understanding the conditions, processes, and contexts that influence teaching and learning. Thus, policy researchers can play a strategic role in supporting systemic educational change in practice if they understand the interplay of multiple contexts and how these contexts shape teachers’ practices and, ultimately, educational outcomes.

The local implementation of policy involves **mutual adaptation**, a process in which policy is redefined to fit local conditions and local conditions are sometimes adapted to fit policy (Berman & McLaughlin, 1977; McLaughlin, 1987, 1990). With respect to school districts, factors influencing adaptation include individual and institutional agendas, community values, material resources, and time (Berman & McLaughlin, 1977; Elmore & McLaughlin, 1988; Firestone, 1989; Fullan, 1991). Each contextual factor has the capacity to significantly shape educational practice. Talbert and McLaughlin’s (1993) embedded contexts of teaching framework was an appropriate model for this study because it is congruent with the concept of systemic reform.
Contextual conditions are highly interactive, and policy research that attends to context can support efforts to rethink or reform policies and, ultimately, practices.

Local educators interpret policies through the lens of their local visions; policies that fit local visions are endorsed, while those that do not are either opposed or modified so that they fit local perceptions. State policies tend to be more general and even vague, thereby allowing school districts to easily construe them in ways that advance their local agendas (Firestone, 1989; Spillane, 1998). Distinct from classroom teachers, the adaptation process (of local district policy-makers) involves constructing reformer’s ideas, as opposed to simply accepting or rejecting the intended reform. Because a school district is not internally homogeneous, state efforts to create more coherent reform initiatives are easily undermined as a policy is mediated by the district. “The state’s relatively coherent reform message becomes diversified and splintered into a variety of mixed messages” (Spillane, 1998, p. 46).

Statement of the Purpose

The purpose of this study was to determine (1) the impact of North Carolina’s gifted reform policy (Article 9B) on local school districts’ programming for gifted students as perceived by local gifted program coordinators, and (2) the extent to which educational changes made in local gifted programs related to other state-initiated systemic reform efforts.

Research Questions:

1. In North Carolina, to what extent do local gifted program coordinators perceive that the implementation of North Carolina Statute Article 9B has taken place?
2. a) To what extent do local gifted program coordinators perceive that gifted services have been impacted by Article 9B in terms of learning environment, program interventions, and content modifications at relevant grade levels, K-12?  
b) What are relationships between the year of implementing Article 9B and the extent to which gifted services are provided?  

3. What do local gifted program coordinators perceive as supporting or impeding factors in implementing a local plan for gifted students?  

4. What are relationships between:  
a) North Carolina’s most powerful state reform efforts and the way gifted services are locally delivered?  
b) The way educational change occurs at the local level and the extent to which the gifted program is integrated with other school system’s initiatives?  
c) The educational context perceived as having the greatest impact on gifted learners and those areas most affected by state-initiated school reform efforts and those areas that need the greatest attention for gifted services to be optimal?  

**Significance of the Study**  
It can be argued that if some of the goals of systemic reform efforts are gains in academic achievement levels of students, promoting positive educational changes, and viewing reform as an integrated, top-down and bottom-up system, then by studying the impact of these goals on programming for gifted students, this research study will have grasped the intent of higher levels of expectations, including teachers’ capacity for educational change, and effects of reforms on policy implementation.
Additionally, by viewing systemic reform efforts on gifted programming through the lens of Talbert & McLaughlin's (1993) conceptual framework of embedded contexts, the researcher was able to describe the complexity of variables as they impact a particular aspect of programming within the larger school system context. This information is valuable to reform policy researchers as well as educators for the following reasons:

1. In the past, policy research has focused on estimating average effects of particular variables across diverse settings rather than examining the conditions and processes of multiple contexts within a particular setting which influence educational change, policy implementation, and, ultimately, educational outcomes. This study focused strongly on such processes.

2. By linking statewide survey information with follow-up telephone interviews, and focus group qualitative data, emerging perspectives on policy implementation attended to the complexities between educational change and reform efforts as well as implications of state versus local control.

3. The paucity of research on the relationship between gifted programming and school reform calls for research of this nature to explain how state-initiated policy impacts local gifted programs.

Without examples of studies that merge contextual reform efforts with programmatic statewide initiatives, it is likely that many policymakers and efforts at reform will continue to produce "islands of excellence," while most districts will continue with familiar strategies and programming of the past with marginal programmatic success. Policy research that takes a systemic perspective can attend to different layers and levers and the ways in which they work together to enable positive
educational change.

**Definition of Terms**

**Article 9B**

The North Carolina General Assembly mandated that each local board of education develop a local plan (Article 9B) designed to identify and establish a procedure for providing appropriate educational services to each academically or intellectually gifted student. In order to implement § 115C-150.5-7 of Article 9B, the state board of education was responsible for the development and dissemination of guidelines for developing local plans. Guidelines addressed identification procedures, differentiated curriculum, integrated services, staff development, program evaluation methods, and any other information the State Board considered necessary or appropriate.

**Systemic School Reform**

Systemic school reform suggests a policy decision made at the state level about what society wants students to learn. It includes three major elements (Smith & O'Day, 1991): the establishment of ambitious outcome expectations for all students, the coordination of key policies in support of the outcome expectations which would be reflected in curriculum frameworks, and the restructuring of the governance system to support high achievement by according schools more flexibility in meeting the needs of their students. Systemic change requires a change system that includes both centralized and decentralized aspects (Clune, 1993).

**Gifted services**

It is defensible on philosophical and developmental grounds to offer each child specific learning experiences for which she or he appears “ready.” Passow (1986b) urged that schools provide experiences which are appropriate and adequate in terms of each
student's unique nature and needs. Gifted programming constitutes those sets of educational experiences designed for a group of learners who are different from other learners of their age, experience, or environment because they “perform or show the potential to perform at substantially high levels of accomplishment” (NC Article 9B § 115C-150.5, 1996).

**Policy implementation**

“Actual implementation is planned change in schools, putting reforms into practice. This stage is often much slower and more complex than policy talk or policy action” (Tyack & Cuban, 1995). Policy implementation is the application of a sanctioned policy by teachers, administrators, and other school faculty and staff. It is where actual service delivery takes place (Gallagher, Coleman, & Harradine, 1997).

Policy implementation is a stage in the progress of educational evolution that is gradual, nonlinear, and subject to contexts, existing assumptions and beliefs. Berman and McLaughlin (1978) stated that “mutual adaptation” between top-down reform efforts and bottom-up efforts was essential for successful implementation.

**Educational change**

Educational change is a planned effort to change schools in order to correct perceived social and educational problems. Change is not synonymous with progress. Educational change requires a shift of the mind because “the answer does not lie in designing better reform strategies...educators must see themselves and be seen as experts in the dynamics of change” (Fullan, 1993).

**Embedded contexts**

Embedded contexts refers to the specific contexts that impact learning, for example, the classroom or the school district. Each context is embedded within another
context so that taken as a whole, one can begin to understand the interplay between contexts (Talbert & McLaughlin, 1993).

Limitations & Delimitations

There were several limitations and delimitations to this study, both conceptual and practical. One state’s reform efforts cannot easily be generalized to another state, nor can consequences of educational change. This study was designed to investigate complex interactions within a conceptual framework and would best be treated through longitudinal research. This study’s results thus offered a limited view of policy impacts. Although the target population for the questionnaire consisted of the total population of individuals overseeing the gifted program, it relied upon self-reporting; therefore, responses given are subjective. A coordinator for gifted programs answering the survey or a teacher answering the focus group interview questions may not be representative of their role. In the follow-up telephone interview stage, it was difficult to standardize the interview process so that this researcher did not influence the respondents. Additionally, the focus group session was semi-structured and taped, so it did not provide total anonymity for the respondents.

This study focused on educational changes surrounding implementing state legislated policy and was not designed to evaluate gifted programs across North Carolina or within any school district. By using a focus group session, the researcher delimited the scope and depth of inquiry at its final stage.
CHAPTER 2

Review of the Literature

Relevant studies in the literature providing the underpinnings of support for this study were found in the areas of policy implementation, educational change, systemic reform, and gifted programming. All these areas contribute to the understanding of how state-initiated educational policy impacts local directions for implementing systemic school reforms. This chapter explores those contributions.

Policy Implementation

Studies of policy implementation aid in our understanding of the possible connections between systemic reform efforts and classroom practice. Following is a review of the pertinent literature on implementing policy, beginning with large-scale educational studies involving one or more states which investigated how policies initiated at higher levels of government get implemented at lower levels of the school system. Following those large-scale studies, qualitative studies at the state level are reviewed which focused on the enactment of specific school reform initiatives and their impact on specific classrooms, and lastly studies of political science policy implementation and their bearing on educational practices are described.

Large-scale Studies

Understanding how state policy enters the classroom door has been an important component for understanding policy research over the past several decades (Cuban, 1990;
Firestone, 1989; Fuhrman, Clune, & Elmore, 1991). Over 20 years of research on the implementation of federal and state education policies have demonstrated the potential as well as the limits of policy as a tool for changing how students are educated. The major limitation is known: implementation matters more than intent.

In reviewing the Rand Change Agent study, undertaken from 1973-1978 from a sample of 293 local projects in 18 states, McLaughlin (1990) suggested that there were four necessary components in order for policies to be effectively implemented: (1) the need to maintain a system orientation, (2) the need to address content and process, (3) the use of natural networks of teachers, and (4) the focus on improving classroom practice. One of the implications of such an argument would suggest the need to examine relationships and consistency among the four components.

Another body of research identified five classes of policy instruments (McDonnell & Elmore, 1987), or the mechanisms that translate policy goals into concrete actions. This research contributed to the understanding of policy implementation in a different way. The researchers suggested that, depending upon the policy goals and context, coherence can be achieved if mandates, inducements, capacity-building, system-changing, and hortatory are factors in policy implementation. This body of research concluded that there is a mutual influence among education policy levels and that the interaction may take the form of one or more classes of policy instruments. For example, many of the reform activities in the 1980s, such as increased graduation requirements, were comprehensive and consistent with existing school processes and frequently complemented many local school districts’ own policy goals. They “made sense” to many educators and fostered an interactive process of educational policy development.
between local districts and state policymakers. They suggest that many local districts use the state policies as springboards for their local solution within a particular context. Moreover, many local districts anticipate state reform initiatives and put into place proactive reform efforts before the state establishes mandates, inducements, or legislation. For example, in a study of six states, researchers at the Consortium for Policy Research in Education found that local activism in reform efforts takes a variety of forms, such as teachers serving on local curriculum framework committees or serving on state committees for assessment protocols. These examples of local activism enabled certain school districts to stay ahead of the state and of peers by enacting policies in anticipation of higher state policies to meet specific needs, and by using state policies as a catalyst for achieving district objectives (Fuhrman & Elmore, 1990). Local school districts did not merely adapt to state policy, but they amplified state policy around local priorities. It is important to note that each local response is not a simple binary relationship between state regulation and subsequent local response. Each state policy outcome is influenced by an existing local capacity that determines differences in local responses. Not much is known about the impact of local response or about which policy instruments coupled with local contexts bring about sustained coherent policy changes.

The majority of reform initiatives of the 1980s were discussed as one dimensional, such as increased graduation requirements, yet the implementation of such reforms at the local levels were disjointed and complex (teacher training, curriculum alignment, student accountability) (Cohen, McLaughlin, & Talbert, 1993). Education reforms strongly reflect political context at the state and local levels. The nature of the political shift sometimes represents a clash of values. For example, the swing from
progressive values to more conservative values between the major political parties reflects their own definitions of schooling and student success. Moreover, when changes in economic stability or shifts in population occur, social change uncovers tensions, which give rise to individuals or groups championing particular values. Media and other groups translate the concerns into recommended policies for schools to enact. These value shifts (Cuban, 1990) lead to policy shifts, but not automatically to changes in practice. In this way, “reforms do return again, and again, and again” (p. 11). The bodies of research on policy implementation, political influences, and cultural values suggest the need to consider issues of coherence of policy over time and to examine the impact of policy within the context of community values.

State-wide Studies

Studies conducted on California’s mathematics (Cohen & Ball, 1990; March & Odden, 1991) and science (Atkin, Helms, Rosiek, & Singer, 1996) curriculum reform efforts provide another connection in our understanding of the relationship between state level reform initiatives and school districts’ policy implementation. These sources drew extensively on qualitative sources and reported on districts that were seen as “frontrunners” of local efforts to improve instruction in the two content areas. Specifically, the studies highlighted different avenues of influence in which reforms might be reaching school districts and, ultimately, classrooms. March and Odden (1991) attributed rapid success of policy implementation to (a) capacity built at the school and district level prior to the enactment of state policy, (b) the formation of new coalitions at the district level that bridged the expertise of teachers with the interests and know-how of district officials, (c) the existence of supportive state initiatives, and (d) creative use of
resources at the school level to help sustain the use of reforms. However, the school districts studied were already fertile ground for policy implementation. What about school districts that are not ready or willing for changes in policy to occur? This research study fell short with regard to answering this question.

Cohen and Ball (1990) conducted case studies of individual teachers’ responses to the California mathematics framework. Across their case studies, teachers showed signs of taking on some of the ideas and procedures of the reform while retaining much of what was familiar to them. This research sheds light on describing teachers’ perspectives at a moment in time but would be more useful if we knew some of the intended or unintended consequences of the teachers’ efforts. Additionally, Cohen and Ball (1990) focused on one specific reform effort, even though, typically, local school divisions are often engaged in multiple reforms (Grant, 1996). As a consequence, this line of work precludes us from concentrating attention on the school or school system as a whole.

Research from ethnographic cases studies on the implementation of systemic science reform in several high schools in southern California considered policy implementation in schools in which tensions between teachers and central administration fractured implementation attempts (Atkins, Helms, Rosiek, & Singer, 1996). School districts studied allocated few resources to support the implementation of the California Department of Education’s (1990) Science Framework for California Public Schools, and only provided teachers with three or four release days to develop a year-long course for integrated science. Disgruntled teachers undermined attempts towards implementation. District administrators responded with coercive measures in order to force teacher compliance. The result was that the integrated science course became a
curriculum option rather than embedded as part of the basic curriculum for all students in the high school. This research confirms the complexity of teacher empowerment and centralized mandates. Additionally, inferences can be made surrounding operationalizing a coordinated and supportive effort between multiple stakeholders in order for policy implementation to result in positive educational change.

Cohen (1995) asked, what is the system in systemic reform? His premise was that systemic reformers seek more coherent state guidance for instruction, but that power and authority have been dispersed in the United States, especially in matters of instruction. Therefore, coherence in policy is not the same thing as coherence in practice. One factor that makes achieving or even maintaining policy coherence difficult is political electoral cycles. Who is in charge of policymaking shifts with each state or local electoral cycles. Education reforms of the 1980s were strongly reflective of state political context, according to a study by Fuhrman, Clune, and Elmore (1988). These researchers found political similarities among five states with regard to key aspects of the reform process. They found that legislators and governors, along with appointed task forces, played critical roles in school reform. “Although some chief state school officers were important reform proponents, the impetus came from outside state departments and state boards of education” (p. 242). Educational associations played a secondary rather than a leading role in reform, and education interests (unions) accommodated rather than shaped reforms, despite the fact that the core of reforms dealt with curriculum, instruction, and accountability.
Policy implementation studies by political scientists shed additional light on policy implementation. This line of policy implementation research focuses on public policies emanating from either federal (Barro, 1978; Hargrove, 1981; Murphy, 1971) or state level (Moore, Goertz, & Hartle, 1991) initiatives. Like educational policy implementation research, these public policy studies are concerned with educational change, but their focus is typically on the larger dynamics by which policies make their way through an intergovernmental system and are reinterpreted in the process and finally enacted in public. These studies typically start with the policy as an announced set of intentions, often combined with resource allocation, and follow the chain of contextual factors that ultimately control the actual direction of policy. This line of investigation draws attention to the relationship between systemic reform and its generating context, such as state government, and how the policy evolves, subject to the political culture. This perspective helps describe the environments or settings in which the policy evolves. In particular, these studies elaborate on the “capacity” (McLaughlin, 1987) of implementing agencies. Yet, this perspective does not readily explain the meaning of capacity, nor what conditions or variables need to be in place so that capacity exists. Additionally, is it enough for just the teachers to have capacity, or do all levels of stakeholders, such as principals, school district administrators, school board members, local government personnel, etc. need to have capacity for effective policy implementation? Furthermore, the research treats capacity as static (Boyd, 1978) rather than dynamic.
Mazzoni's (1993) seminal work on the changing politics of state education policy over a 20 year period in Minnesota analyzed 20 case studies and related the findings to Iannaccone's (1967) structural linkage typology. According to Iannaccone's model, the key to a state's policy-making dynamics is to be found in the relationship among its education interest groups and between these groups and the legislature. Iannaccone's typology identifies four basic configurations: Locally-based disparate (Type I), Statewide monolithic (Type II), Statewide fragmented (Type III), and Statewide syndical (Type IV). Mazzoni identified Minnesota's political evolution as a Type III but recognized shortcomings with the typology as capturing the kind of reality revealed by the Minnesota findings. Type III is relevant to the present study because Mazzoni's findings showed that as policy was decentralized from state to local control, the evolutionary process became fragmented along the way based upon political interpretations of the policy's intent. Mazzoni's analysis adds to the body of research relating policy implementation to the evolving and influential nature of state politics. His analysis reinforces the notion that the policy process from state-initiated reform efforts to local implementation cannot be captured conceptually as a rational model but must take into account the complexity and synthesis of the change process.

Finally, lessons learned from policy implementation have taught us that policy is transformed and adapted to conditions of the implementing unit. Local manifestations of state policy will differ fundamentally based upon the local context.

Educational Change

The literature on change is diverse, reflecting the fact that the study of change is complex-in part due to the varying definitions of change and in part because of the
interaction of a multitude of variables over a period of time. Since change is dynamically complex, it is nonlinear. We cannot totally predict or guide its process. Additionally, change implies that something results differently than it began. For example, in school systems change frequently moves from an adoption of policy through implementation to, possibly, institutionalization as a permanent feature of the system.

Since 1974, within the context of educational change, much of the literature has focused on the implementation process (Berman, 1978; Berman & McLaughlin, 1978; Crofton, 1981; Fullan & Pomfret, 1977). According to this literature, several broad factors influence the implementation process. They are the characteristics of the change, the strategies and methodologies used to implement the change, the characteristics of the teachers charged with implementing change, the school environment in which the change occurs, and the outside environment which impedes or advances schools’ decisions about the educational change.

Crofton (1981) reviewed educational change in Illinois and associated five important issues with successful implementation. First, meaningful change occurs as a process, not as an event. This process must take place over a period of time; according to Crofton this period must be at least two years. Second, the involvement of teachers is not only helpful but may be a necessary condition for change. Third, continual participation is necessary from high level administrators down to classroom aides. Fourth, administrative involvement, support, and enthusiasm are required to set the implementation process in motion. Lastly, material resources are needed, but these resources cannot be prescriptive. They must allow for individual teachers to adapt the change for their classroom and school. Crofton’s work is consistent with Berman and
McLaughlin's (1980) framework because with mutually adaptive changes, implementation is determined by both local factors and administrative support and participation.

A review of a number of studies and reports elicited eight factors critical to successful educational change, Crandall and Associates (1982), Crandall, Eiseman, and Louis (1986), the Dissemination Study Supporting Local School Improvement (DESSI), Fullan (1985), Huberman and Miles (1984), Odden and Marsh (1989) and McLaughlin (1993). The factors are as follows:

1. Ambitious efforts are better. Ambitious efforts have more impact on classroom change than do narrowly focused projects. Ambitious efforts are also effective in stimulating teacher interest, engagement, and involvement.

2. The micro-implementation/change process is key. The specific change processes are more important than the type of change pursued, geographical location, or ethnic characteristics of districts or schools. How a change effort is conducted is more important than what it is, where it is implemented, or for whom it is attempted.

3. High quality, proven effective programs work better. Research-based programs with a track record of success produce more outcome success than locally created programs. This finding is somewhat different from the Rand (1978) conclusion that local, teacher-developed materials are important.

4. Top-down initiation works. While the Rand (1978) study suggested that bottom-up initiation seemed to work better, Huberman and Miles (1984) showed that top-down initiated efforts not only could work, but actually were successful in more instances than bottom-up initiated change efforts. Top-down works only if followed by teacher
involvement in designing implementation strategies and if ongoing assistance is provided to teachers in classrooms and schools (Fullan, 1985; Livingston & Borko, 1989; Purkey & Smith, 1985).

5. Central office support and commitment are needed along with site administrator support, commitment, and knowledge. Nearly all studies found that administrative commitment at the beginning, during the process of implementation, and when complete implementation occurred was important for successful implementation and institutionalization.

6. Teacher participation matters. Teacher involvement helps engage teachers in the overall change effort, provided that key teacher input into designing implementation strategies is used.

7. Extensive, intensive, ongoing training and classroom-specific assistance for learning new instructional strategies is critical. All studies, including Rand (1978) and post-Rand, documented the importance of this factor.

8. Teacher commitment is critical. Few successful change efforts reached advanced stages unless teacher commitment to the project was developed. The research differs in whether teacher commitment should be at the initial involvement of implementation (Rand, 1978) or at the end of the implementation cycle (Huberman & Miles, 1984) when teachers can see that a program “works” (Odden, 1991).

Cohen (1990) described the difficulties of developing in depth the knowledge and skills needed to teach the new California mathematics and science curriculum. He documented that complex change takes substantial time and perhaps the recruitment of more able individuals into teaching. It is possible that given the complexity of
implementing an effective gifted program—knowledge of the unique learner, knowledge of a differentiated curriculum, knowledge of the change process, and commitment to implementation of school reform efforts within differing local contexts—effective educational change in gifted education may not be attainable in the short run and, therefore, has not been documented in short term projects.

Research on educational change by Fullan and Pomfret (1977) found that changes with high complexity tended to have a low degree of successful implementation. Like Crofton (1981), they found that participation in decision-making by all stakeholder levels contributed to successful implementation. Rice (1978) reported that Fullan and Pomfret may have overestimated the importance of both the characteristics of change and the strategies used to implement the change. However, Fullan and Pomfret (1977) did find that politically complex changes are not likely to be successfully implemented.

Systemic Reform

Embodied in the research on systemic reform are assumptions around reform activity that attempt to overhaul educational practices comprehensively. This stream of activity addresses the content of what is being taught, the approach to teaching, assumptions about the learner and learning, and the manner in which instruction and learning are assessed (Knapp, Bamburg, Ferguson, & Hill, 1998). These ambitious initiatives emanate from federal, state, or local levels of school governance and seek to promote improved student learning by trying to make the flow of resources, programmatic requirements, and established expectations coherent and aligned (Fuhrman, 1993; Smith & O'Day, 1991). The design focus for systemic reform policy addresses central elements of the educational system at the same time. Emerging findings regarding
systemic reforms over the past several years illustrate mixed effects on instruction, classrooms, and learning.

Knapp (1997) assembled and analyzed studies of large-scale systemic reform initiatives aimed at mathematics and science education, predominately those undertaken by state governments and the National Science Foundation (NSF). His qualitative review established patterns of the ways systemic reforms intervene with mathematics and science classrooms. The patterns are as follows:

1. Within various science and math classrooms, teachers have been touched by reforms in a variety of ways. There are attempts by teachers to advocate aspects of reform into classroom practice (e.g., the use of manipulatives in mathematics teaching in the elementary grades), but little evidence exists of teachers fully grasping and internalizing reform vision.

2. Cases reported to date suggest that teachers engage in significant new learning about their practice. While teachers reported not necessarily learning the same things nor what the original reform visions promoted, systemic strategies seem to have been responsible for stimulating a large amount of learning at the individual level more than at the organizational level.

3. Systemic reform strategies appear to have reached the classroom through three main avenues: the environment, professional ideas, and supportive actors. The environment that bears on the classroom has changed as requirements related to curriculum content and assessment have been aligned. Professional ideas, through professional networks and other forms of professional development, have reverberated a set of notions about subject matter knowledge, learning, and
teaching that teachers in various ways have acted through their interpretations.

Engagement of teachers in professional communities appears to be an important feature of the high-capacity settings which have been documented as doing the most to incorporate reforms into practice. The mobilization of state and local actors in support of reform goals have been active at multiple levels of the educational system.

4. Local contexts vary considerably, and there is evidence of clear contrasts between high- and low-capacity contexts. Schools with cohesive staffs who are used to demands of ambitious reforms and who have begun to develop collegial learning communities appear the most receptive to what the reforms are calling for.

5. At the district level, case evidence exists of district-level staff engaging in extensive attempts to understand reform visions in some depth, and in turn, provide helpful forms of support to teachers. In some contexts, district-level staff implement reforms without grasping deeply what the reforms are all about and transmit to teachers guidance that is viewed as unhelpful, intrusive, or both.

Although Knapp (1997) revealed patterns of systemic reforms in mathematics and science classrooms, there is little indication of system-wide trends, how teachers' rendering of reform ideas is related to local context, nor the conduits through which reform ideas reach teachers.

Conley and Goldman (1998), in a review of the literature on systemic reform, noted that many states had adopted standards-based reform in an effort to forge more coherent policy even in the absence of public support or the allocation of resources to implement the reform efforts. The researchers noted that these state initiatives had not yet
provided effective guidance on how to improve instruction, and that they put more emphasis on finance issues and structural changes than on high-quality instruction and classroom changes. However, the researchers did note that schools have demonstrated changes in attitude, practice, and student achievement, even though achievements have been uneven. In Kentucky, for example, state mandates have changed the tenor of educational processes and accountability, reaching into buildings and classrooms (Steffy, 1993). Fullan (1994) found that when mandates connect with the aspirations and capabilities of local schools, significant change may ensue. He found that change occurs when top-down mandates and bottom-up initiatives connect. "Education reform legislated at the state level can be an effective means of improving schools when it is woven into a cohesive strategy at the local level" (Fullan, 1994, p. 4).

Many educational policymakers favor the concept of a hybrid top-down, bottom-up approach to reform. Yet, there is considerable uncertainty about how best to implement such an approach. In a recent study by Schmidt and Prawat (1999), data were obtained and analyzed as part of the Third International Mathematics and Science Study (TIMSS) to examine which sets of decisions were made at the centralized level (e.g., state) or at the classroom level from the participating 41 countries. Decisions were categorized as follows: those decisions which were centrally determined, with little or no local input; those that were the outgrowth of a shared top-down, bottom-up process; and those educational decisions that were universally made at the local school or teacher level. The researchers drew their results from two instruments developed for use in the TIMSS study: a participation questionnaire which was sent to a selected national informant, typically a ministry official, and a teacher questionnaire which was sent to
those teachers identified as part of the sample. Results showed that in more than 80% of the systems analyzed, K-12 goal setting for students, such as learning goals or, in the United States, standards setting, was conducted at the central authority level. Decisions surrounding issues of content of instruction, course offerings, and course syllabi were more frequently a shared decision, and decisions regarding method of instruction, lesson planning, and textbook selection were predominantly a local decision. A conclusion was that even in countries in which ministry officials dictate grade-level goals, course assignment rules, or course syllabi, teachers reportedly feel completely free to exercise their own judgment about how best to meet the learning needs of students. Based upon their analysis, Schmidt and Prawat (1999) concluded that “the case can be made that U.S. policymakers have overestimated the need for those at the local level to ‘own’ educational decisions about goals and content of instruction” (Schmidt & Prawat, 1999, p. 91). The researchers made some compelling arguments for central control, but in America the diffusion of educational control thwarts attempts toward any unifying consensus around the content of what is being taught, the approach to teaching, assumptions about the learner and learning, and the manner in which instruction and learning are assessed.

Tyack and Cuban’s (1995) historical policy analysis highlighted the ebb and flow of political power and its influence on systemic reform initiatives. They framed the tension between Americans’ faith in education and the incremental nature of changes in educational practices. Their interpretation of school reform blends political and institutional analysis. Much of the struggle for support for special programs for the gifted also has correlated with high and low points in political interest and commitment.
(Gallagher, 1979; Reis, 1989; Renzulli, 1980; and Tannenbaum, 1983). Moreover, programming services for gifted learners is frequently attributed to a reaction of political motives by individuals or groups. This value-added complexity would seem to have a low degree of successful implementation. Little research exists that yields information regarding implementing educational change in gifted programs within a political system and the degree to which the implementation would be described as successful.

Despite the literature on systemic reform, educational change, and policy implementation, insufficient research has focused on the impact of school reform policy on gifted learners. Implementation of policy with regard to programming for gifted learners adds a layer of complexity because not only does it imply changes in school system practices, but also any policy shift for gifted learners represents a philosophical stance on educating highly able learners. The rhetoric of school reform has reflected the tensions between two competing elements of American democratic ideals: access and educational equality, and the structuring of educational opportunities to prepare students for a competitive market economy. Possibly, nowhere in schools are these tensions borne out more dramatically than in programs for gifted learners.

Gifted Programs

Competing values of egalitarianism and individual potential have clashed throughout American history and "have muddled efforts to provide a quality education for the nation's most promising students" (USDOE, 1993, p. 13). In 1990, President George Bush and the National Governor's Association made an effort to bring broad political support for reform ideas into a tangible form by agreeing on six national goals to be achieved by the year 2000. Subsequently, the U.S. Department of Education embarked
upon America 2000, a series of strategies designed to bring the national goals into reality. The goals indicated America's ambiguity of concerns regarding the need for educational equity and educational excellence. For example, one of the goals is for our students to be number one in mathematics and science, and yet a plethora of attempts toward acceleration for the gifted have been thwarted (Van Tassel-Baska, 1993). Researchers have pointed to various ebbs in national interest and commitment to educating the gifted (Gallagher, 1979; Renzulli, 1980; Tannenbaum, 1983). "The cyclical nature of interest in the gifted is probably unique in American education. No other special group of children has been alternately embraced and repelled with so much vigor by educators and laypersons alike" (Tannenbaum, 1983, p. 16). Providing a different educational program for gifted in terms of equity means that all children should have their educational needs met in the school program and "all" children means all children, including gifted students. If educationally they require different content and strategies based upon their past knowledge, ability to learn quickly, ability to think in-depth on issues, then equity would dictate providing to these students what they need (Clark, 1995; Gallagher, 1997). Given the current stages of school reform in the United States, the issue of equity and excellence is particularly relevant.

The paucity of research on policy implementation impacting gifted programs may well be more of a reflection of political and cultural values than lack of efforts to document changes in implementing quality programs. The literature on what happens when gifted students are grouped together has been disputed for over 70 years (Kulik & Kulik, 1991; Slavin, 1988, 1990; Van Tassel-Baska, 1992), but positive evidence exists suggesting that gifted students profit from an accelerated and enriched curriculum that
can only be presented in a special environmental setting (Gallagher & Gallagher, 1994; Gallagher, 1997; Van Tassel-Baska, 1992). The decision to do something “different” for gifted students may be more of a reflection by school administrators to satisfy the goals of school reform reflecting equity rather than on whether educationally, it is good for gifted students. State policy makers and school administrators must think about the totality of a school system or community, not just one sub-population within the system. Pockets of a separate initiative may be acceptable, but typically state and local policies are aimed toward the entire system. Limited evidence exists as to the impact of policies aimed for a larger body of students on a sub-group of students who are atypical of the norm (Shore, Cornell, Robinson, & Ward, 1991).

One recent study conducted in Britain (Koshy & Casey, 1998) focused on teachers’ perceptions of how the National Curriculum affected educational opportunities of higher ability pupils. In a random sample of teachers in 244 schools in England and Wales, researchers found that many teachers recognized the contribution made by the National Curriculum in offering an effective framework useful for most children, but they did not feel that the National Curriculum offered particular support with regard to higher ability pupils. The British teachers described the need for support with curriculum planning in the context of higher ability pupils. “Teachers need more guidance. Providing for the most able in our school is a national issue and should be supported at the national level. In some way the National Curriculum has created the possibility for a child climbing a ladder; it is up to the teacher to provide an opportunity to broaden the knowledge. What is needed is an interesting and exciting curriculum for all” (Koshy & Casey, 1998, p. 260). Policies usually directed toward the improvement of the entire
system are not likely to motivate gifted learners toward achieving at high levels of performance. Labeling a group of learners as gifted implies a condition of separateness that local and state policymakers would rather ignore, or just advocate an excellent educational system that would benefit all children (Renzulli & Reis, 1991). Higher student expectations and challenging curricula are underpinnings of systemic reform for all children, yet a paucity of research exists bearing directly upon the effects of systemic reform efforts on gifted learners.

A few curriculum studies based upon systemic reform initiatives have been conducted providing some research evidence of curricula impact on gifted learners (Van Tassel-Baska, Bass, Ries, Poland & Avery, 1998; Van Tassel-Baska, Johnson, Hughes, & Boyce, 1996). Both studies used a systematic methodology and assessment approach for teachers to employ in their classrooms with gifted learners. One study assessed gifted students' growth on integrated science process skills after being taught a 20-36 hour science unit (Van Tassel-Baska et al., 1998). The unit was based upon the National Science Education Benchmarks and curriculum features appropriate for gifted learners (Van Tassel-Baska, 1996). Significant differences were reported between the experimental and control groups, lending credence to the argument for using systemic reform efforts in content standards as a basis for curriculum development efforts with gifted learners. The other study, (Van Tassel-Baska et al., 1996) showed significant growth gains in literary analysis, persuasive writing, and linguistic competency for seven experimental classes of gifted learners in comparison to three control classrooms not receiving the curriculum. Both studies acknowledged the criticality of reform at the classroom level.
Recent reports (USDOE, 1993) have documented that a majority of gifted learners spend a substantial part of their school day in unchallenging academic endeavors. “Despite sporadic attention over the years to the needs of bright students, most of them continue to spend time in school working well below their capabilities” (p. 5). As a result, National Excellence put forth seven initiatives to improve educational experiences for gifted learners: (1) teacher development, (2) challenging curriculum standards, (3) more challenging opportunities to learn, (4) increasing access to early childhood gifted education, (5) increasing learning opportunities for disadvantaged and minority children with outstanding talents, (6) broadening the definition of giftedness, and (7) matching world performance by making gifted students globally competitive.

Landrum, Katsiyannis, and DeWaard (1998) recently conducted a follow-up national study to examine states’ efforts on the seven initiatives cited in National Excellence. Findings indicated that progress has been made in the areas of teacher development (24 states indicated the existence of certification in gifted education), enhanced curricular standards (23 states indicated efforts to raise curriculum standards), and efforts to match world performance (10 states reported efforts toward matching world performance by gifted students). Other findings indicated limited efforts toward serving early childhood gifted children, expanding the inclusion of minority and disadvantaged gifted, and broadening the definition of gifted. However, researchers concluded that the level of progress was inconclusive because not all states have data regarding these areas. The context of systemic reform includes these initiatives. It would be useful to consider more in depth the nature and extent to which these initiatives have impacted the education of gifted students within the context of systemic reform. Robinson (1992)
concluded that "to date there are no systematic studies of the way advocates secure and maintain programs for gifted children" (p. 10).

A gifted program status study by Purcell (1995) examined the status of local programs for gifted students using descriptive ex post facto research. Using purposive sampling, Purcell sampled 3,000 local gifted coordinators across 19 states, and in a follow-up phase, conducted interviews with key personnel. Her guiding questions addressed three issues; the current status of programs (expanded, reduced, eliminated, threatened with reduction, elimination but intact, or intact), causes attributed to current status, and perception of key respondents regarding which factors led to the elimination or retention of programs for gifted students. Patterns in responses revealed that states with mandates for gifted programming (56%) attributed the stability and expansion of local programs to the existence of a state mandate and healthy economic educational funding. Conversely, 46% of respondents attributed their jeopardized status to a decline in funding and lack of a state mandate. Purcell noted, through Phase 2 that "policy decisions resulting from reform issues, did not feature prominently in the data when viewed across the categories of states."(p. 62). One of Purcell’s recommendations was that "annual research, similar to this study and conducted at the state level by advocates, is needed to monitor changes in the base line established by the current findings and to understand the fluctuations that affect programs for high-ability students"(p. 64). She further added, "Without data related to the status of programs, policymakers have little information, or reason, to redesign educational initiatives for high-ability students" (p. 65). The current study would provide some of the necessary data relevant to local programs and implications of state-directed reform efforts.
Summary

Systemic reform initiatives have resulted in many changes in educational programs over the past decade (Fullan, 1994; Knapp, 1997; Van Tassel-Basker, Avery, Hughes, & Little, 1999). As reforms are being implemented, the articulation of policymakers' intents in order to change classroom practices continue to present numerous challenges to policymakers, administrators, educators, and the public. It is within this broad context that assuring that the educational needs of gifted students are addressed would provide insight into issues surrounding equity, excellence, and educational change (USDOE, 1993). Infusing the idea of educating the gifted into a school system’s policies or state policies implies a basis for developing quality programming for all students.

Talbert and McLaughlin’s (1993) embedded contexts of teaching provides this research study with an important framework because it underscores the complexities of implementing local gifted policy in light of state-initiated reform efforts and views educational change as a non-linear, interactive process. An analysis of the relationship between the majority of literature review studies findings for policy implementation, educational change, systemic reform and gifted programming to the conceptual framework used for this research study may be found in Table 2. An “x” within a given column represents a study’s finding that included the specific embedded context of teaching.

Although distinct services for gifted learners should be defined through policy, they should be integrated and implied within the framework of broader policy statements that impact all aspects of curriculum, teacher development, and assessment. If the aim of
systemic reform reflects those approaches deemed necessary to ensure excellence in educational experiences and outcomes, then examining reform efforts on gifted learners provides meaningful insight into the analysis of expectation levels for excellence (Robinson, 1996).
<table>
<thead>
<tr>
<th>Literature Strands</th>
<th>Studies (Major Findings)</th>
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Table 2

Literature Review Findings consonant with Talbert and McLaughlin’s (1993) Embedded Contexts of Teaching

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CHAPTER 3

Methodology

The purpose of this study was to determine (1) the impact of North Carolina’s gifted reform policy (Article 9B) on local school districts’ programming for gifted students as perceived by local gifted program coordinators, and (2) the extent to which educational changes made in local gifted programs related to other state-initiated systemic reform efforts.

Research Questions:

1. In North Carolina, to what extent do local gifted program coordinators perceive that the implementation of North Carolina Statute Article 9B has taken place?

2. a) To what extent do local gifted program coordinators perceive that gifted services have been impacted by Article 9B in terms of learning environment, program interventions, and content modifications at relevant grade levels, K-12?

   b) Does the year of implementing Article 9B impact the extent to which gifted services are provided?

3. What do local gifted program coordinators perceive as supporting or impeding factors in implementing a local plan for gifted students?

4. What are relationships between:

   a) North Carolina’s most powerful state reform efforts and the way gifted services are locally delivered?
b) The way educational change occurs at the local level and the extent to which the gifted program is integrated with other school system's initiatives?

c) The educational context perceived as having the greatest impact on gifted learners and those areas most affected by state-initiated school reform efforts and those areas that need the greatest attention for gifted services to be optimal?

Research Design

This study used a mixed design, tapping both quantitative and qualitative methods. The quantitative portion was a researcher-designed survey administered to the total population of individuals in charge of each of North Carolina's school district gifted program. The state-wide survey was Phase I of the study methodology. For the majority of school districts, this was the gifted coordinator, but for other school districts, this person held a different primary role, such as exceptional children's program administrator or gifted lead teacher.

In the qualitative portion of the design, telephone interviews were conducted with a stratified random sample of 15% of statewide survey respondents, based upon reported school district type. Telephone interviews from a stratified random sample of selected respondents based on demographics provided verification and further inquiry into the survey responses (Eisenhart & Borko, 1993; Stake, 1995). These interviews documented and verified perceptions about implementation of North Carolina's mandated statute Article 9B, including impeding or supporting local factors, and the relationship between implementation of Article 9B and the larger North Carolina school reform agenda. Telephone participants were fully informed that their participation was voluntary; that
they may refuse to respond to any particular question; and that they may stop participation at any time without penalty. Telephone interviews were Phase II of the study.

Lastly, one selected focus group session occurred. Participants in the focus group represented each level of the conceptual framework (i.e. teacher, school administrator, community member, etc.) in order to obtain perceptions of the implementation of Article 9B from their context. The researcher selected participants from across North Carolina. No two focus group members were from the same school district. One focus group member was a survey respondent. Participants responded to researcher questions (see Appendix D) in order to verify results from the survey, to provide further depth to questionnaire and interview results, and as a basis for considering contexts in relation to the implementation of state policy. Allowing for a focus group session avoided putting the researcher in a directive role and allowed participants to respond to an area of interest, in a non-threatening relaxed environment (Gall, Borg, & Gall, 1996). Focus group participants were fully informed that their participation was voluntary; that they could refuse to respond to any particular question; and that they may stop participation at any time without penalty. A statewide survey, telephone interviews, and a focus group session were used to examine the research questions through multiple data sources.

Sample

Statewide Survey

The sample population for the statewide survey consisted of the total population of gifted program coordinators in North Carolina. The individual responsible, at the local school district level, for overseeing programs for gifted learners received the survey. At the time of this study, there were 117 school district gifted programs across North
Carolina. This researcher obtained the names, addresses, and positions of individuals from the North Carolina State Department of Public Instruction (NCDPI). A cover letter explaining the purpose of the study and a date of return accompanied the survey. Subjects were not required to identify themselves or their school districts. The researcher, however, coded the surveys in order to identify school districts for purposes of instituting follow-up procedures for unreturned surveys and telephone interviews.

**Telephone Interviewees**

Following the return of surveys, the researcher selected a stratified random sample based upon school district type of 15% of the respondents to conduct telephone interviews lasting for an average of 45 minutes each. Telephone interviews were selected from the original respondent survey sample. Stratification occurred based upon the grouping variable of type of school district as reported by survey respondents. Selecting a stratified random sample provided a more representative sample than simple random sampling (Kiess, 1996). Respondents were asked to verify survey results as well as to elaborate on selected questions drawn from the survey (see Appendix C). Participation in telephone interviews was voluntary.

**Focus Group**

Lastly, the researcher selected a state-wide focus group sample with membership constituting the layers from the conceptual framework (Talbert & McLaughlin, 1993). Focus group members represented specific educational contexts. The focus group members were: teachers, content expert, school administrator, district administrator, parent, higher education representative, state gifted advocacy organization representative, and a member from the state department of public instruction. Members represented
geographic diversity in North Carolina, and no two members were from the same school
district. Focus group members responded to the same questions that were provided to the
telephone interviewees (see Appendix D).

Instrumentation/Protocols

Statewide Survey

The statewide questionnaire, was administered in early February, 2000 and
contained a synthesis of questions adapted from the Statewide Technical Assistance for
Gifted Education (Gallagher & Coleman, 1993), as well as new questions developed by
the researcher with the assistance of the former North Carolina state director of Gifted
Education, in the North Carolina Department of Public Instruction. The survey contained
four sections. Section I asked for demographic data. Section II had questions regarding
the school district’s current gifted program and included questions for each component
contained in Article 9B. Section III included questions representing areas in the literature
review regarding state-initiated school reform activities. Section IV of the survey
contained questions on implementing educational change. Each survey section
corresponded with the research questions.

Specific questions A, B, E, F, G, H, I, J, and K found in Section II (current gifted
program) reflect the eight components within Article 9B that have been prescribed by the
North Carolina’s General Assembly (see Table 3). Questions modified from the
Statewide Technical Assistance for Gifted Education (1993), are reflected in Section II,
describing the school district’s current gifted program. Researcher questions comprise the
rest of the survey.
Table 3

**Article 9B components and relevant survey questions**

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<tr>
<th>North Carolina General Statute 115C-150.7 Article 9B components</th>
<th>Relevant sections &amp; questions in survey instrument</th>
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<tbody>
<tr>
<td>1. Screening, identification, and placement procedures</td>
<td>Section II B</td>
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<td>2. Statement of program to be offered</td>
<td>Section II E</td>
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<td>3. Curriculum design that aligns with core curriculum</td>
<td>Section II F, G</td>
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<td>4. Professional development plan</td>
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<td>5. Community involvement plan</td>
<td>Section II I, J</td>
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<tr>
<td>6. Identifiable person responsible for implementation</td>
<td>Section I</td>
</tr>
<tr>
<td>7. Due Process procedure</td>
<td>Section II K</td>
</tr>
</tbody>
</table>

The survey was field-tested on a group of coordinators for gifted programs from Virginia in September and October 1999, to validate the data collection survey instrument and verify that survey results yield the desired data. Pilot surveys were disseminated to 20 coordinators of gifted programs in Virginia school districts. Eleven pilot surveys were returned (55%). Pilot surveys were reviewed by the researcher in order to ascertain that the questions were understood by all members of the pretest sample. Following the piloting of the survey, Question II C and D were revised and reformatted for ease of response. As a result of these changes, the questionnaire was ready for dissemination in North Carolina. A rate of return of more than 70% (Gall, Borg, & Gall, 1996), was targeted in order to make inferences from the total population sampled. Follow-up phone
calls and postcards were conducted in order to boost the rate of return for responses not returned within a four-week period. A copy of the survey may be found in Appendix C.

**Interview Questions**

The same interview questions were used with both telephone interviews and the focus group. Eight questions created by the researcher were used in order to elicit answers that corresponded with the research questions (see Appendix D). Telephone interviews were conducted with a stratified random sample of 15% of statewide survey respondents, based upon reported district type and averaged 45 minutes each. Interviews were transcribed. Stainback and Stainback (1990) reported that semistructured interviews are a good method to learn about the perceptions of people. Interview questions used guided the discussion by asking specific questions to obtain clarification of survey responses, and to allow for a greater depth of response. Interview responses provided verification and further inquiry into the survey responses provided in the survey (Eisenhart & Borko, 1993; Stake, 1995). Additionally, interviews documented and verified perceptions about implementation of North Carolina's mandated statute Article 9B. Respondents were asked to describe, elaborate, and verify perceptions surrounding the implementation of Article 9B including impeding or supporting local factors, and the relationship of their local gifted program to state-initiated reform efforts.

Lastly, the interview instrument that was used with the telephone respondents was used with the researcher-selected focus group. The interview lasted approximately three hours and was taped. Later, a transcription was typed in order for the researcher to note patterns and trends in responses from embedded contexts. The focus group session was conducted in a bank building, rather than within a school district, in order to increase
anonymity. The location was geographically central to North Carolina. The focus group interview model was selected as a data source because of its capacity to provide rich data and because of its relative efficiency as a means of collecting data (Merriam, 1988).

Study Procedures

This study was carried out during Spring, 2000. Collection of data was completed in three phases. Phase I was a survey targeting the total population of 117 school districts in North Carolina, sent the beginning of March to the person responsible for overseeing the local gifted program, typically a gifted program coordinator. Following survey returns, Phase II involved conducting follow-up telephone interviews held during April and May. The final phase of data collection, Phase III, was one focus group session, held the end of May, consisting of a researcher-selected statewide representative group. Members of the focus group reflected the roles represented in the conceptual framework (Talbert & McLaughlin, 1993) used in this study.

Phase I

A cover letter was sent to the total population in North Carolina of individuals responsible for their school districts' gifted programming in early February, 2000. Various strategies were employed to increase the response rate (Gall, Borg, & Gall, 1996). Every effort was made to make the items easy to read, understand, and complete. A stamped, self-addressed envelope was enclosed for respondents to return the survey to the researcher. Additionally, the researcher included along with every survey, a complimentary note pad as a thank you in anticipation of higher returns. As noted by Fowler (1984), "the most important difference between good mail surveys and poor mail surveys is the extent to which researchers make repeated contact with the
nonrespondents" (p. 54). To that end, follow-up phone calls and reminder postcards were mailed at the end of February, 2000.

**Phase II**

Following survey returns, a stratified random sample of 15% of the respondents based upon school district type was selected for telephone interviews. Interviews, typically, lasted less than one hour and in one case, was provided via email communication. Respondents were asked interview questions in light of their survey responses for verification and elaboration. In order to consider the extent to which the impact of Article 9B's implementation has occurred, follow-up telephone interviews were necessary.

**Phase III**

The next procedure for the study, following the survey returns and telephone interviews, occurred in late May, 2000. The researcher selected and conducted one focus group session. The composite of the focus group members represented layers of the conceptual framework. Additionally, focus group members were geographically diverse. The researcher sent out individual invitations requesting attendance. Members came at their own expense, but the researcher did provide a gift to each member in appreciation for their time and help. The session was conducted at a bank building, providing a neutral environment within the session to occur. The building was geographically central within North Carolina so that no focus group member was expected to travel more than a few hours from their home. The session lasted approximately three hours and members were asked interview questions (see Appendix D) that provided the researcher with rich data.
on the perceptions of each member. The focus group session was audio-taped and notes were taken at the session as well.

Data Analysis Procedures

Data analysis refers to the process in which data collected are broken down, conceptualized and put back together again in a novel way by use of induction (Strauss & Corbin, 1990). Data analyzed from this study included survey responses, interview responses, and focus group commentary. Descriptive statistics were employed to characterize demographic information, current gifted programming, supporting or impeding factors of implementing Article 9B, state-initiated school reform, and educational change factors.

Qualitative responses provided another layer by which the researcher verified and checked survey respondent answers. Phase II and III cross-validated survey respondent data and provided another level of analysis. The follow-up telephone interviews and the focus group session were analyzed by emerging themes or patterns provided by the responses. Subsequently, the researcher compared transcriptions across interview questions using a process by which “data emerge that fit an existing category” (Glaser & Strauss, 1967). Emerging themes and patterns were clustered under broader themes. Qualitative responses verified survey responses and provided additional data not found in the survey results.

A table of specifications providing the correlating research questions, data collection method, data source, and data analysis technique is provided in Table 4.
### Table 4

#### Table of Specifications

<table>
<thead>
<tr>
<th>Research Question</th>
<th>Data Collection Method</th>
<th>Data Source</th>
<th>Data Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>perceive that the implementation of North Carolina Statute Article 9B has</td>
<td></td>
<td></td>
<td>Qualitative</td>
</tr>
<tr>
<td>taken place?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. a) To what extent do local gifted program coordinators perceive that gifted</td>
<td>Survey</td>
<td>Survey-Section II A, E</td>
<td>Descriptive statistics</td>
</tr>
<tr>
<td>services have been impacted by Article 9B in terms of learning environment,</td>
<td></td>
<td></td>
<td>Qualitative</td>
</tr>
<tr>
<td>program interventions, and content modifications at relevant grade levels, K-12?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Does the year of implementing Article 9B impact the extent to which gifted</td>
<td>Telephone</td>
<td>Interview questions</td>
<td>Qualitative</td>
</tr>
<tr>
<td>services are provided?</td>
<td>Interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Focus Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. What do local gifted program coordinators perceive as supporting or impeding</td>
<td>Survey</td>
<td>Survey-Section II C, D</td>
<td>Descriptive statistics</td>
</tr>
<tr>
<td>factors in implementing a local plan for gifted students?</td>
<td>Telephone</td>
<td>Interview</td>
<td>Qualitative</td>
</tr>
<tr>
<td></td>
<td>Focus Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. What are relationships between:</td>
<td>Survey</td>
<td>Survey-III A, III B</td>
<td>Descriptive statistics</td>
</tr>
<tr>
<td>a) North Carolina's most powerful state reform efforts as perceived by</td>
<td>Telephone</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>coordinators and the way gifted services are locally delivered?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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b) The way educational change occurs at the local level and the extent to which the gifted program is integrated with other school system's initiatives?

<table>
<thead>
<tr>
<th>Method</th>
<th>Survey</th>
<th>Telephone Interview</th>
<th>Focus Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td>IV A, G</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>Statistics</td>
<td>Descriptive</td>
<td>Qualitative</td>
<td></td>
</tr>
</tbody>
</table>

c) The educational context perceived as having the greatest impact on gifted learners and those areas most affected by state-initiated school reform efforts and those areas that need the greatest attention for gifted services to be optimal?

<table>
<thead>
<tr>
<th>Method</th>
<th>Survey</th>
<th>Telephone Interview</th>
<th>Focus Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sections</td>
<td>IV F, III B, C</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>Statistics</td>
<td>Descriptive</td>
<td>Qualitative</td>
<td></td>
</tr>
</tbody>
</table>

Research Question 1

To address question one, “In North Carolina, to what extent do local gifted program coordinators perceive that the implementation of North Carolina Statute Article 9B has taken place,” descriptive statistics were employed on Survey Section II. Data were reported as frequency distributions for current gifted program dimensions, and components mandated by Article 9B.

Surveys refer to documents that ask the same questions of all individuals in the sample (Gall, Borg, & Gall, 1996). A survey was developed for use in this study because its question format is standardized and offers insight into the respondents’ perception about the extent to which implementation of Article 9B (local gifted program) and the extent to which educational changes in local gifted programs related to other state-initiated systemic reform efforts. Descriptive statistics were employed to analyze all
relevant survey questions. Chi-square analyses were run to compare selected variables between school districts. For example, important differences may be seen between those coordinators who have been employed in their current position less than five years and those who have been employed in their current position for more than ten years. Those coordinators who have been in their current position for more than ten years would have experiences prior to and subsequent to implementation of Article 9B and may have better insight into the impact of the mandated policy on programming.

Qualitative sources stemming from the telephone interviews and the focus group session elaborated survey findings on the components of Article 9B that have been implemented. Patterns and trends were noted with categories emerging from frequency of transcriptions.

Research Question 2

To address part "a" of research question 2, "To what extent do local gifted program coordinators perceive that gifted services have been impacted by Article 9B in terms of learning environment, program interventions, and content modifications at relevant grade levels, K-12," descriptive statistics were employed to analyze responses on whole group responses. Part "b", "Does the year of implementing Article 9B have any bearing on the extent to which gifted services are provided?" was analyzed using subgroup data broken down by the year implementation began with survey data from Section II E. Descriptive statistics were employed to analyze responses to this question drawn from Section II E and Section II A. Nominal data reporting on frequencies of responses in Section II E and chi-square analysis on subgroup (part b) of question 2) were

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employed. Comparisons were made between districts on selected variables using chi-square level of significance to be employed at the alpha level, p < .05 level.

Analysis of telephone interviews involved interpretations constructed by the researcher intended to verify survey results, capture key features of a given phenomenon, and to describe complex processes involved with implementing Article 9B. For research question 2, the researcher looked for correlations and patterns between the year of Article 9B implementation and the extent to which gifted services were comprehensively provided. Emergent response patterns were explored.

**Research Question 3**

Research Question 3, “What do local gifted program coordinators perceive as supporting or impeding factors in implementing a local plan for gifted students?” were analyzed using descriptive statistics on survey data collected from Section II Questions C and D. Follow-up telephone interview data, collected from a 15% stratified random sample, verified and elaborated upon survey responses. Telephone respondents were asked Interview Questions 4 and 5. Qualitative data considered any emerging trends or patterns revealed through telephone interviews. Merriam (1988) reported that the use of multiple sources provides data analysis strength since the weakness of one data source can be overcome by other sources. Focus group members were asked Interview Questions 4 and 5 to provide another source of qualitative data from different contextual roles. Categories emerged for both telephone interview respondents and focus group members.

**Research Question 4**

Research Question 4, “What are the relationships between: a) North Carolina’s most powerful state reform efforts as perceived by coordinators and the way gifted
services are locally delivered? b) The way educational change occurs at the local level and the extent to which the gifted program is integrated with other school system's initiatives, and c) The educational context perceived as having the greatest impact on gifted learners and those areas most affected by state-initiated school reform efforts and those areas that need the greatest attention for gifted services to be optimal?

Data analyzed used descriptive statistics and qualitative patterns from telephone respondents and focus group members. For Part a) of Research Question 4, the grouping variable was derived from survey responses found in Section III, Question A ("In your opinion, what are the three most powerful forces affecting the delivery of gifted education services in your state within the last three years?") and was analyzed using frequency counts to determine the most powerful forces, followed by crosstabulations with respect to current gifted services. For Part b) of Research Question 4, the grouping variable was how respondents perceive change to occur in their school districts (Section IV, Question G). A chi-square analysis was run. For Part c of Research Question 4, the grouping variable was the survey response provided in Section IV, Question F ("In your opinion, which one of the following contexts has the greatest impact for educational change with gifted learners?") and was analyzed with respect to survey responses to Questions III B and C, respectively (areas most affected by state-initiated school reform efforts and areas in greatest need of attention for local gifted services to be optimal). Following a frequency test which determined the number of responses per interval data, an ANOVA on state-initiated reform efforts was run between rural, suburban, and urban districts.

Data generated from the follow-up telephone interviews (Interview Questions 6 through 8) were qualitatively reported with regard to emergent patterns and themes and to
verify survey responses. Finally, responses generated by the focus group were qualitatively reported with regard to emergent patterns provided by representative members from various layers of the conceptual framework. Focus group responses and telephone interviews were transcribed, reviewed and narratively compared to gifted program coordinator responses provided in the telephone interviews.

Validity and Reliability Considerations

Validity

Internal validity addresses how much research findings match reality (Gall, Borg, & Gall, 1996). Threats to internal validity could include researcher bias as well as inaccurate reporting and analysis of data. To counteract these threats, the researcher employed the following strategies; (1) provided for survey anonymity in order for participants to respond freely, (2) field tested the survey instrument, allowing the researcher to detect poorly worded questions and check for content validity, and (3) conferred with a professional contact from North Carolina to conduct member checks to insure the accuracy of the researcher's perceptions.

External validity relates to the transferability of the research findings to other settings (Gall, Borg, & Gall, 1996). In this study, external validity was limited to (a) the researcher using the total population of gifted coordinators in North Carolina, (b) the types of school districts surveyed, (c) the use of the researcher as sole collector of data, (d) the comparison of data with empirical studies, (e) researcher-selected telephone respondents and focus group members, and (f) the review of policy documents.
Reliability

One meaning of reliability is if two researchers independently conducted the same study in the same setting, they would arrive at the same findings and conclusions (Yin, 1994). The telephone interviews and the focus group session conducted qualitatively assume changing conditions and context. Therefore, the traditional meaning of reliability does not fit the assumptions of qualitative researchers. To address the matter of reliability, Lincoln and Guba (1985) recommended the construct of consistency. Consistency means that given the data collected, the results would make sense to an outsider. The researcher conducted two qualitative phases, allowing for greater consistency. This provided an audit trail to check the reliability of responses between survey respondent findings and telephone and focus group respondent findings. By having at least two stages of qualitative analyses, there were safeguards to enhance consistency.

Ethical Considerations

This study was conducted in a manner that protects the anonymity of all participating school districts. In order to ensure that ethical safeguards are upheld, the researcher informed participants that their participation was voluntary, important, desirable, and anonymous (Gall, Borg, & Gall, 1996). In addition, participants were allowed to withdraw from the study at any time. Information was held in the strictest confidence and participants' identities were protected so that information collected would not embarrass or harm them in any way. For both the telephone interviews and the focus group session, informed consents were utilized to further protect the participants and reassure them about the scope of the study and use of the results. In addition, this study
was submitted to the College of William and Mary, School of Education Human Subjects review committee for review and approval.
CHAPTER 4

Findings

This study was carried out during Spring, 2000, targeting the total population of 117 school districts in North Carolina. Collection of data was completed in three phases. Initially, a survey was sent at the beginning of March to the person responsible for overseeing the local gifted program, typically a gifted program coordinator. Following survey returns, telephone interviews were conducted. The final phase of data collection was one focus group session, held the end of May, consisting of a researcher-selected statewide representative group. Members of the focus group reflected the roles represented in the conceptual framework (Talbert & McLaughlin, 1993) used in this study. This chapter describes the findings from these three phases of the study.

Sample

The sample for this study involved three groups: survey respondents (N=71), telephone interview respondents (N=11), and focus group members (N=5).

Survey respondent sample

The sample for the survey instrument consisted of the total population of persons in North Carolina responsible for oversight of the school district's gifted program. A total of 117 surveys were mailed out, and following postcard reminders, phone calls, and emails, 71 surveys were returned, resulting in a 61% return rate. Figure 1 displays the
Figure 1

North Carolina Survey Respondent Distribution

Legend
Black returned surveys (N=71)
White unreturned surveys (N=46)
distribution of responses. It is important to note that a few of the counties represented may contain a city and/or a county school system.

**Telephone interview sample**

Qualitative data were collected through telephone and email interviews conducted with a subgroup of survey respondents. A stratified random sample was selected based upon the school district type of rural, suburban, or urban to ensure a representative geographic and diversified sample. Survey respondents identified their district types. Eleven respondents were interviewed from the original survey sample (15%). The interview group consisted of two exceptional children’s program administrators, one director of instruction, four lead teachers, and four academically gifted coordinators for a total of eleven interviews. Demographic breakdown included five survey subgroup interviews from rural districts, three that identified themselves as suburban districts and three as urban school districts. Table 5 shows the distribution of school district type selected for the interviews.

**Table 5**

<table>
<thead>
<tr>
<th>School district type</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suburban</td>
<td>3</td>
<td>27.3 %</td>
</tr>
<tr>
<td>Urban</td>
<td>3</td>
<td>27.3 %</td>
</tr>
<tr>
<td>Rural</td>
<td>5</td>
<td>45.3 %</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>11</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>
Focus group subgroup sample

The focus group sample was purposefully selected by the researcher to ensure two things: statewide representation and reflection of each educational context from the conceptual framework (Talbert & McLaughlin, 1993). The group consisted of an elementary classroom teacher, a middle school principal, a coordinator for a school system's gifted program, a parent of three identified gifted children, and a professor. Members of the focus group responded to questions surrounding the implementation of Article 9B from their representative lens. Each member represented a different layer of the conceptual framework, and in addition, no two members were from the same school system. Five representatives were present (out of eight layers) for the session. The contextual roles represented were: classroom teacher, principal, academically gifted coordinator, parent, and professor of higher education. Missing from the focus group members were; a subject area/content expert (although the teacher representative served as both teacher and content expert), a representative from the department of public instruction, and a representative from the state advocacy group. Additionally, the academically gifted coordinator representative on the focus group was also a survey respondent. Following the "no-show" by the current state department representative and state advocacy group, follow up phone calls and two separate email attachments were sent. Neither calls nor email attachments were returned. A third attempt to contact the current or previous state department representative through follow-up phone calls did not yield responses.

This findings chapter is reported in the same manner that the study was conducted. First, survey results are reported for all survey sections. Following survey
findings, telephone interview findings are reported. Third, findings are reported from the statewide focus group sample. Finally, the chapter concludes with findings reported by research question.

Phase I Findings: Survey results

Demographic results from the survey

Survey section I asked for demographic information on survey respondents. Categories represented in the demographic section of the survey were: (1) current position, (2) number of years in current position, (3) number of years in school district, (4) number of years in education, (5) number of students in school district (size), (6) type of school district, (7) number of students on free and/or reduced lunch, and (8) if school district had been selected as a model site by the North Carolina Department of Public Instruction. Frequency counts were run on the demographic information provided by respondents.

Position currently held in school district

Table 6 represents the positions held by the individuals responsible for overseeing the school system’s gifted program. Of the respondents, 31% (N= 22), stated that they were full time Academically/Intellectually Gifted (AIG) Coordinators. Another approximately 24% (N= 17), identified themselves as Exceptional Children’s Program Administrators, holding responsibilities for both the gifted program and special education. Other positions held by respondents included AIG lead teacher (21%), director on instruction (18%), and associate superintendent (4%). One respondent identified him/herself as retired from the school district and rehired to oversee the school district’s gifted program.
Table 6

Position currently held in school district

<table>
<thead>
<tr>
<th>Current Position</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIG Coordinator</td>
<td>22</td>
<td>31.0</td>
</tr>
<tr>
<td>ECP Administrator</td>
<td>17</td>
<td>23.9</td>
</tr>
<tr>
<td>AIG Lead Teacher</td>
<td>15</td>
<td>21.1</td>
</tr>
<tr>
<td>Director of Instruction</td>
<td>13</td>
<td>18.3</td>
</tr>
<tr>
<td>Associate Superintendent</td>
<td>3</td>
<td>4.2</td>
</tr>
<tr>
<td>Other: retired/rehired</td>
<td>1</td>
<td>1.4</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

*Note.* AIG refers to Academically and/or Intellectually gifted. ECP refers to Exceptional Children’s Program.

Years in Current Position

Based upon 71 respondents, over 54% had held their current position for 0-3 years. Another 28% had held their current position for a period from 4-10 years. Approximately 3% had held their current position for over 25 years. See Table 7 for a complete breakdown by years in position.

Table 7

Years in Current Position

<table>
<thead>
<tr>
<th>Years in Current Position</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 3</td>
<td>39</td>
<td>54.9</td>
</tr>
<tr>
<td>4 - 6</td>
<td>10</td>
<td>14.1</td>
</tr>
</tbody>
</table>

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Years in School District

Over 29% of the respondents had been employed with their respective school districts between 7 and 14 years. Over 23% of the respondents had been employed with their school districts for over 25 years. Fewer than 10% had been employed within the school district for less than 3 years. Table 8 demonstrates respondents' years of employment within their districts.

Table 8

<table>
<thead>
<tr>
<th>Years in District</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 3</td>
<td>7</td>
<td>9.9</td>
</tr>
<tr>
<td>4 - 6</td>
<td>5</td>
<td>7.0</td>
</tr>
<tr>
<td>7 - 10</td>
<td>10</td>
<td>14.1</td>
</tr>
<tr>
<td>11 - 14</td>
<td>11</td>
<td>15.5</td>
</tr>
<tr>
<td>15 - 19</td>
<td>7</td>
<td>9.9</td>
</tr>
<tr>
<td>20 - 24</td>
<td>14</td>
<td>19.7</td>
</tr>
<tr>
<td>25+</td>
<td>17</td>
<td>23.9</td>
</tr>
</tbody>
</table>
As shown in Table 9, over 46% of the respondents had more than 25 years of experience in education. Of the 71 respondents, no one had fewer than seven years of educational experience.

Table 9

<table>
<thead>
<tr>
<th>Years in Education</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 - 10</td>
<td>1</td>
<td>1.4</td>
</tr>
<tr>
<td>11 - 14</td>
<td>6</td>
<td>8.5</td>
</tr>
<tr>
<td>15 - 19</td>
<td>11</td>
<td>15.5</td>
</tr>
<tr>
<td>20 - 24</td>
<td>20</td>
<td>28.2</td>
</tr>
<tr>
<td>25 +</td>
<td>33</td>
<td>46.5</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Table 10 summarizes student populations in the responding school systems. Reported populations represent enrollment in Spring, 2000. Over 28% of the school systems responding have a total student population of fewer than 3000 students. Over 23% responded with populations between 4000 and 6000 students. Student populations between 7000 and 10,000 made up 15% of survey respondents districts. Reported student populations between 15,000 and 19,000 as well as 20,000 and 24,000 each represented...
5% of respondents. A final 7% of respondents reported having over 25,000 students in their school system.

Table 10

Number of students

<table>
<thead>
<tr>
<th>Number of Students (in thousands)</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 3</td>
<td>20</td>
<td>28.2</td>
</tr>
<tr>
<td>4 - 6</td>
<td>17</td>
<td>23.9</td>
</tr>
<tr>
<td>7 - 10</td>
<td>15</td>
<td>21.1</td>
</tr>
<tr>
<td>11 - 14</td>
<td>4</td>
<td>5.6</td>
</tr>
<tr>
<td>15 - 19</td>
<td>4</td>
<td>5.6</td>
</tr>
<tr>
<td>20 - 24</td>
<td>5</td>
<td>7.0</td>
</tr>
<tr>
<td>25+</td>
<td>5</td>
<td>7.0</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

School District Type

The school district type represents the delineation of a local school system's designation as rural, suburban, and urban as reported by the survey respondent. Among the respondent population, 71% classified themselves as rural school systems in North Carolina, approximately 17% classified their school systems as suburban and another 11% as urban, as shown in Table 11.
Table 11

School District Type

<table>
<thead>
<tr>
<th>District Type</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suburban</td>
<td>12</td>
<td>16.9</td>
</tr>
<tr>
<td>Urban</td>
<td>8</td>
<td>11.3</td>
</tr>
<tr>
<td>Rural</td>
<td>51</td>
<td>71.8</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Free and/or reduced lunch

Respondents were asked to designate the percentage of their total school population, classified as receiving free and/or reduced lunch. Over 28% of the respondents left the answer blank. Over 29% of the respondents classified from 31-40% of their total student population as receiving free and/or reduced lunch. Over 29% of the respondents classified over 41% of their total student population as receiving free and/or reduced lunch. Table 12 shows the percent of students on free or reduced lunch by respondent school districts.

Table 12

Free and/or reduced lunch

<table>
<thead>
<tr>
<th>Percent receiving Free/Reduced Lunch</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 10</td>
<td>1</td>
<td>1.4</td>
</tr>
<tr>
<td>11 – 20</td>
<td>2</td>
<td>2.8</td>
</tr>
<tr>
<td>21 – 30</td>
<td>6</td>
<td>8.5</td>
</tr>
</tbody>
</table>
31 – 40 21 29.6
41+ 21 29.6
Total 71 100

Model site

In 1993, the North Carolina Department of Public Instruction selected nine school systems to pilot new local gifted plans prior to the legislated act of Article 9B. Table 13 displays how many survey respondents were selected as one of the nine models. Of the nine model sites, eight were also survey respondents, constituting approximately 11% of the respondents.

Table 13

<table>
<thead>
<tr>
<th>Selected as model site</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>63</td>
<td>88.7</td>
</tr>
<tr>
<td>Yes</td>
<td>8</td>
<td>11.3</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Survey section II: Current gifted program

In Section II of the survey, respondents were asked questions about their current gifted program. Article 9B of Chapter 115C of the North Carolina General Statutes mandates that local plans for gifted education contain eight components (see Appendix A). Questions corresponding with Article 9B components are as follows: (1) screening, identification, and placement procedures, (2) different types of program services, (3) measurable objectives for program services, (4) professional development opportunities,
(5) plan for involving and disseminating information to the school community, parents, and local community, (6) role and description of person responsible for implementation, (7) a procedure for resolving disagreements, and (8) other information deemed necessary by the local school board. Frequency counts were run on the eight components of Article 9B included as Section II in the survey. In Section II of the survey, respondents were asked to check the year they began implementing Article 9B (local gifted plan). Choices provided began with the school year 1996-97 and ended with the school year, 1999-2000. Following frequency counts, crosstabulations were run to see whether the year of implementing a new gifted plan had any bearing on the extent to which the current gifted program is in place. The last part of Section II in the survey asked respondents two questions: the degree to which respondents perceive that the services to gifted students had changed since the implementation of a new local plan for gifted, and the degree to which they perceive having a local plan for gifted has impacted the overall school system.

Year of implementation

Survey respondents were asked to check the school year that they began implementing the new local gifted plan, as mandated by Article 9B. Table 14 displays their responses. Over half of the respondents (59%), began implementation during the 1998-99 school year, two years after it was legislated. Nearly 3% began implementation during the 1999-2000 school year. The selected model sites began implementing in 1996-97, accounting for 8 out of the 12 indicating implementation in that year.
Table 14

Implementation Year

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996 - 97</td>
<td>12</td>
<td>16.9</td>
</tr>
<tr>
<td>1997 - 98</td>
<td>14</td>
<td>19.7</td>
</tr>
<tr>
<td>1998 - 99</td>
<td>42</td>
<td>59.2</td>
</tr>
<tr>
<td>1999 - 00</td>
<td>2</td>
<td>2.8</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Screening, identification, and placement procedures

School systems were asked whether or not screening, identification, and placement procedures were in place for their gifted program. With the exception of one respondent, 98%, answered yes to that question, indicating compliance with the state mandate.

Measurable objectives for state gifted services

Survey respondents were given three choices related to measurable objectives and were instructed to select only one answer. Choices provided were whether they had measurable objectives for their array of gifted services, no measurable objectives for their gifted services or some measurable objectives for gifted services. More than 32% responded that they had measurable objectives for their stated gifted services, while another approximately 52% stated that they had some measurable objectives.
Evaluate components of their plan

Respondents had to select only one choice on whether they had a method to evaluate their local gifted plan based upon improved student performance. Choices provided were yes, they evaluate all components of their local gifted plan, or no, they do not evaluate their local gifted plan, or whether certain components of their gifted plan were evaluated. The survey did not ask respondents to list the components, which were evaluated. More than 43% of the respondents stated that they evaluated components of their local gifted plan. Another approximately 48% responded that some components were evaluated, and 8.5% responded that they did not evaluate their plan.

Professional Development

Respondents were asked to write in the number of professional staff developments that had occurred since the implementation of Article 9B, as well as specifically check a list of which sessions had been offered. Over 12% of the survey respondents had conducted more than 26 professional development sessions. Close to 10% had conducted between 21 and 25 sessions. Over 15% had conducted between 11 and 20 professional development sessions. Approximately 35% had conducted between 1 and 10 sessions. Over 26% of respondents did not select a range of sessions. Table 15 shows the frequencies and percents for the number of professional development sessions.
Table 15

Professional Development Sessions

<table>
<thead>
<tr>
<th>Number of Sessions Conducted</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>19</td>
<td>26.8</td>
</tr>
<tr>
<td>1 - 5</td>
<td>14</td>
<td>19.7</td>
</tr>
<tr>
<td>6 - 10</td>
<td>11</td>
<td>15.5</td>
</tr>
<tr>
<td>11 - 15</td>
<td>5</td>
<td>7.0</td>
</tr>
<tr>
<td>16 - 20</td>
<td>6</td>
<td>8.5</td>
</tr>
<tr>
<td>21 - 25</td>
<td>7</td>
<td>9.9</td>
</tr>
<tr>
<td>26+</td>
<td>9</td>
<td>12.7</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Regarding the choice of sessions provided to respondents, the list included: (a) Curriculum differentiation, (b) Characteristics of gifted learners, (c ) Use of multiple criteria for identification purposes, (d) Social and emotional needs of the gifted, (e) Performance assessment, and (f) Special populations of the gifted. Professional development on curriculum differentiation was indicated by 87% of the respondents. Characteristics of gifted learners was checked by 83% of the respondents. Using multiple criteria for identifying gifted learners was checked by 78.9%. Holding a professional development session on social-emotional needs of the gifted was indicated by 40.8% of respondents, while 43.7% checked performance assessment and 38% of respondents held sessions on special populations of gifted learners.
Involved stakeholders

Another component embedded in Article 9B is the use of a task force with membership from multiple stakeholder groups to support implementation of the local plan. Survey respondents were asked to check which members in the community were involved with implementing their plan. Choices included parents, central office personnel, students, community members, and others such as school personnel or a hired professional. Table 16 shows the frequencies for member involvement with implementation. Of respondents, 94% involved parents and central office personnel as representatives on their task force, and 60% involved students as part of the stakeholder group.

Table 16

**Stakeholder Involvement**

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Not Involved</th>
<th>Involved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency (%)</td>
<td>Frequency (%)</td>
</tr>
<tr>
<td>Parents</td>
<td>4 (5.6%)</td>
<td>67 (94.4%)</td>
</tr>
<tr>
<td>Central Office Personnel</td>
<td>4 (5.6%)</td>
<td>67 (94.4%)</td>
</tr>
<tr>
<td>Students</td>
<td>28 (39.4%)</td>
<td>43 (60.6%)</td>
</tr>
<tr>
<td>Community Members</td>
<td>31 (43.7%)</td>
<td>40 (56.3%)</td>
</tr>
<tr>
<td>Others: (schools, hired consultant)</td>
<td>55 (77.5%)</td>
<td>16 (22.5%)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>71</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>
Disseminate information about local plan

Another component of Article 9B, dissemination of information about the local plan, was reflected in the survey with a question asking respondents to indicate their specific methods of dissemination information. Choices included newsletters, conferences, annual meetings, end of the year performance assessment to the community, or other mode. Frequency counts were run, and the most frequently reported means to disseminate information regarding Article 9B were conferencing with parents (84.5%), annual meetings (78.9%), and newsletters (64.8%). Sending an end of the year report to parents or community members received the lowest response level, with 29.6% of respondents.

Role of person responsible for implementation

A component of Article 9B is to state, within the plan, a name and role of the person responsible for overseeing the implementation process. As stated earlier within the description of the survey sample, more than one-third of the respondent sample stated that they were full time Academically/Intellectually Gifted (AIG) Coordinators. Another approximately 24% identified themselves as Exceptional Children’s Program Administrator, holding responsibilities for both the gifted program and special education. One respondent was identified as retired from the school district and rehired to oversee the school system’s gifted program.

Due Process

Respondents were asked whether or not they had a procedure for resolving disagreements related to either identification and/or placement decisions. Seventy
respondents (98.6%) responded affirmatively that a due process procedure was in place. One respondent left the answer blank.

Belief about change

In order to determine the extent to which respondents felt that their school system's gifted plan had changed, respondents were asked to identify the statement that best described their belief about the school system's services to gifted students. The choices included (a) that the way the school system served gifted students had completely changed since the implementation of Article 9B, (b) that services had not really changed since the implementation of Article 9B, or (c) that in some ways, services to gifted students had changed and in some ways. Over 84% indicated that in some ways services had changed. Over 12% indicated complete change in the way gifted students are served. Approximately 3% indicated no change. Table 17 displays the respondents' beliefs regarding the degree of change.

Table 17

<table>
<thead>
<tr>
<th>Degree of change</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Change</td>
<td>2</td>
<td>2.8</td>
</tr>
<tr>
<td>Some Change</td>
<td>60</td>
<td>84.5</td>
</tr>
<tr>
<td>Complete Change</td>
<td>9</td>
<td>12.7</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Crosstabulations based upon the year of implementation revealed two respondents whose plans were implemented beginning in the 1998-99 school year indicated that no
change had taken place. Yet, thirty-eight respondents whose plans were implemented the same year (1998-99) indicated some change and two respondents indicated complete change. Table 18 shows the results.

Table 18

Amount of Change by Implementation Year

<table>
<thead>
<tr>
<th>Implement Year</th>
<th>None</th>
<th>Some</th>
<th>Complete</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996 – 1997</td>
<td>0</td>
<td>8</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>1997 – 1998</td>
<td>0</td>
<td>11</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>1998 – 1999</td>
<td>2</td>
<td>38</td>
<td>2</td>
<td>42</td>
</tr>
<tr>
<td>1999 – 2000</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>2</td>
<td>59</td>
<td>9</td>
<td>70</td>
</tr>
</tbody>
</table>

Note: One respondent indicated some change but did not designate the implementation year.

Belief about impact of gifted plan

The final belief question in Section II (current gifted program) asked respondents to identify the statement which came closest to their belief about the impact of their local gifted plan on the overall school system. The choices included, (a) that having a local plan for gifted has significantly impacted the overall school system, (b) that having a local plan for gifted has had no impact on the overall school system, or (c) that having a local plan for gifted has had some impact on the overall school system. Every respondent (N=71) indicated either significant or some impact on the overall school system. Of the
71 respondents, 20 (28%) indicated significant impact. Table 19 displays the results of the respondents regarding the impact of a local gifted plan on the overall school system.

Table 19

Plan Impact

<table>
<thead>
<tr>
<th>Impact</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some Impact</td>
<td>51</td>
<td>71.8</td>
</tr>
<tr>
<td>Significant Impact</td>
<td>20</td>
<td>28.2</td>
</tr>
<tr>
<td>No Impact</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Crosstabulations were run between the year of implementation and the impact belief statement. Six respondents who began implementation during the 1996-97 school year cited some impact, and another six who began implementation that same year (1996-97) cited significant impact on the overall school system. Among those school systems which began implementation during 1998-99, 33 respondents answered that some impact had taken place, while nine school systems responded that significant impact had taken place. Frequency counts per cell were too few for a chi-square analysis. Table 20 displays the results of plan impact by implementation year.

Table 20

Amount of Impact by implementation year

<table>
<thead>
<tr>
<th>Implement Year</th>
<th>Some Impact</th>
<th>Significant Impact</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996 – 1997</td>
<td>6</td>
<td>6</td>
<td>12</td>
</tr>
<tr>
<td>1997 – 1998</td>
<td>9</td>
<td>5</td>
<td>14</td>
</tr>
</tbody>
</table>
Survey section II: Matrix of services by grade level clusters

Survey respondents were asked to complete a matrix of specific services reported for all grade levels, K-12 (see Appendix B) in Section II. Services were grouped using the categories of learning environment (LE), program interventions (PI), and content modifications (CM). Question E in Section II asked respondents to list services currently in place by code, under the categories of learning environment, program intervention, and content modifications for each grade level, K-12. Each category had multiple services listed to choose from, and respondents were to list every service provided. Frequency counts were run for each category. Grades levels were grouped into K-3, 4-5, 6-8, and 9-12 for analysis. These grade level groupings are representative of grade level clusters used with North Carolina’s state assessments. A frequency code table is included for all grade level clusters, service categories of learning environment, program interventions and content modifications (see Table 21). Only percentages greater than 10% are reported in the table. The criterion of 10% was selected for both service categories and length of years because a less than 10% response rate were used by a minimum number of responding school districts across North Carolina.

<table>
<thead>
<tr>
<th></th>
<th>LE</th>
<th>PI</th>
<th>CM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998 - 1999</td>
<td>33</td>
<td>9</td>
<td>42</td>
</tr>
<tr>
<td>1999 - 2000</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>50</td>
<td>20</td>
<td>70</td>
</tr>
</tbody>
</table>

Note: One respondent indicated some impact but did not designate the implementation year.
A sub-question asked for the length of time in years each service has been in place. Additionally, frequency counts were run on the number of years each category (LE, PI, and CM) per grade level cluster has been in place.

**Service categories: Learning environment, program interventions, and content modifications for grades K-3**

At the K-3 level, under the learning environment category, the greatest percentages of reported services were regular heterogeneous classroom (70.4%); consultation (64.8%) (gifted specialist works with classroom teacher and/or students within classroom setting); regular classroom with cluster grouping (38%); regular classroom with pull-out (35.2%), cross-grade for one subject area (student advances to higher grade level for a specific subject area) (35.2%), and flexible grouping (grouping and regrouping students within a classroom based upon ability and/or interest) (24%).

In response to how many years the selected learning environments had been in place, 24% of respondents indicated that the regular heterogeneous classroom has been in place for greater than 10 years. Respondents were split on the length of years for the pull-out service; almost 10% responded more than ten years, and another 22.5% responded 0-3 years. For 43% of respondents, using a consultant to work with classroom teachers has been in place for less than 3 years. The service of cluster grouping in the regular classroom was reported as being in place 0-3 years by 23.9% of respondents.
Table 21

**Frequency of services per category by grade level clusters**
(Reported response greater than 10%)

<table>
<thead>
<tr>
<th>Category</th>
<th>Service</th>
<th>K-3rd</th>
<th>4th-5th</th>
<th>6th-8th</th>
<th>9th-12th</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning Environment</strong></td>
<td>Heterogeneous class</td>
<td>70.4%</td>
<td>43.7%</td>
<td>42.3%</td>
<td>29.6%</td>
</tr>
<tr>
<td></td>
<td>Pull-out</td>
<td>35.2%</td>
<td>46.5%</td>
<td>19.7%</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Cluster grouping</td>
<td>38.0%</td>
<td>46.5%</td>
<td>42.3%</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Self-contained</td>
<td>&lt;10%</td>
<td>11.3%</td>
<td>&lt;10%</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Cluster and pull-out</td>
<td>19.7%</td>
<td>50.7%</td>
<td>25.4%</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Consultation model</td>
<td>64.8%</td>
<td>57.7%</td>
<td>46.5%</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Individualized Education Plan (I.E.P)</td>
<td>14.1%</td>
<td>26.8%</td>
<td>16.9%</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Flexible grouping</td>
<td>23.9%</td>
<td>29.6%</td>
<td>21.1%</td>
<td>16.9%</td>
</tr>
<tr>
<td></td>
<td>Multiage classroom</td>
<td>15.5%</td>
<td>&lt;10%</td>
<td>&lt;10%</td>
<td>16.9%</td>
</tr>
<tr>
<td></td>
<td>Cross-grade for subject</td>
<td>35.2%</td>
<td>29.6%</td>
<td>29.6%</td>
<td>16.9%</td>
</tr>
<tr>
<td></td>
<td>Subject grouping</td>
<td>&lt;10%</td>
<td>39.4%</td>
<td>78.9%</td>
<td>45.1%</td>
</tr>
<tr>
<td><strong>Program Interventions</strong></td>
<td>Honors classes</td>
<td>N/A</td>
<td>N/A</td>
<td>22.5%</td>
<td>94.4%</td>
</tr>
<tr>
<td></td>
<td>AP courses</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>95.8%</td>
</tr>
<tr>
<td></td>
<td>Dual enrollment</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>69.0%</td>
</tr>
<tr>
<td></td>
<td>Mentorships</td>
<td>N/A</td>
<td>&lt;10%</td>
<td>&lt;10%</td>
<td>46.5%</td>
</tr>
<tr>
<td></td>
<td>Int’l Baccalaureate</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>&lt;10%</td>
</tr>
<tr>
<td></td>
<td>Grade advancement/early admission</td>
<td>40.8%</td>
<td>35.2%</td>
<td>31.0%</td>
<td>28.2%</td>
</tr>
<tr>
<td></td>
<td>Group students by program model</td>
<td>15.5%</td>
<td>19.7%</td>
<td>19.7%</td>
<td>&lt;10%</td>
</tr>
</tbody>
</table>

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At the K-3 level, only one service was selected under the category of program interventions receiving a frequency tabulation of greater than 10%. For 40.8% of respondents early admission/grade advancement, where students are allowed to enter a grade level at a younger age than the norm, was the predominant program intervention at the K-3 level. When respondents were asked how long this program intervention has been in place, 15.5% responded 0-3 years and another 11.3% responded more than 10 years.

Under the category of content modifications at the K-3 level, services selected by respondents receiving percentages greater than 10% were individualized assignments/projects, (66.2%), utilization of a packaged curriculum,(32.4%), continuous progress (allowing students to progress through the material at own pace), (28.2%), testing out of material prior to instruction (pre-assessment), (32.4%), utilizing accelerated content a minimum of one grade level above student placement, (31%), integrating content among subject areas, (22.5%), using student contracts, (26.8%) and integrating competitions in daily classroom work,(11.3%).

When respondents were asked how many years the content modifications had been in place, 38% of respondents checked that using individual assignments/ projects as
a content modification has been in place 0-3 years. Utilization of a packaged curriculum had been in place for 0-3 years by 32.4%. For 22.5% of the respondents, testing out of material (pre-assessment) has been in place 0-3 years, and utilizing accelerated content was reported as being in place for 0-3 years by 31% of respondents.

**Service categories: Learning environment, program interventions, and content modifications for grades 4-5**

For 4th and 5th grades, under the category of learning environment, services selected by the highest percentage of respondents were consultation (gifted specialist works with classroom teacher and/or students within a regular classroom setting), (57.7%), using cluster grouping and pull-out, together with the regular classroom, (50.7%), using only pull-out or cluster grouping as a learning environment in grades 4 and 5, (46.5%), and having students in a regular heterogeneous classroom with no other identified service, (43.7%).

The number of years that each of the most frequently cited learning environment services at the 4-5 grade level has been in place is as follows: regular heterogeneous classroom—greater than 10 years (15.5%), regular classroom with pull out—greater than 10 years (22.5%), regular classroom with cluster grouping—0-3 years (23.9%), regular classroom with cluster grouping and pull-out—0-3 years (28.2%), subject grouping— the same response rate was given for both 0-3 years and more than 10 years (12.7%) and utilizing a consultant—0-3 years (32.4%).

At the 4th-5th grade level, two services were selected under the category of program interventions receiving percentages greater than 10%. For 35.2% of respondents, early admission/grade advancement, where students are allowed to enter a grade level at a
younger age than the norm, was selected as a program intervention at the 4th-5th grade level. The other intervention identified was utilization of a program model, 19.7%.

Respondents were split with regard to the length of time that early admission/grade advancement has been in place. Specifically, 0-3 years was selected by 9.9%, another 12.7% responded more than 10 years and 69% of respondents did not answer how many years early admission/grade advancement has been in place at grade levels 4 and 5. For the program intervention time of using a specific model, 80% of respondents provided no answer to length of time this intervention has been in place.

In the area of content modifications for grade levels 4 and 5, services selected by respondents receiving percentages greater than 10%, in descending order, were: individualized assignments/projects, (69%), testing out of material prior to instruction (pre-assessment), (52.1%), using student contracts, (52.1%), utilization of a packaged curriculum, (50.7%), providing accelerated content a minimum of one grade level above student placement, (43.7%), integrating across subject areas with a theme or concept, (38%), using competitions in daily classwork, (33.8%), and continuous progress (moving through regular curriculum at own pace) (32.4%).

Each service was listed as being in place between 0-3 years. Individual assignments/projects have been in place 0-3 years by 29.6% of respondents. Pre-assessment has been in place 0-3 years, by 29.6%. Lastly, 28.2% of respondents checked that student contracts have been in place 0-3 years.
Service categories: Learning environment, program interventions, and content modifications for grades 6-8

Respondents selected services for gifted learners under the category of learning environment modifications at grade levels 6-8. Learning environment services receiving percentages greater than 10%, in descending order, were as follows: subject area grouping (grouping gifted learners together in a classroom for a specific subject area) had 78.9% of the respondents indicating the presence of the service, utilization of a consultant was found in 46.5% of the districts, having services provided in a regular heterogeneous classroom with no other identified service was 42.3%, using cluster grouping within a regular classroom was 42.3%, cross-grading (students advance to a different grade level in a specific subject area), was used by 29.6%, cluster grouping within the classroom and pull out was used by 25.4%, while flexible grouping was employed by 21%, pull-out only, by 19.7%, and using individual education plans was found in 17% of the districts.

When asked how long each learning environment service has been in place for the most frequently cited responses for grade levels 6-8, 12.7% checked that the regular heterogeneous classroom has been in place both 0-3 years, and more than 10 years, yet 64.8% of respondents left that question unanswered. For 19.7% of respondents, cluster grouping for grades 6-8 has been in place 0-3 years. For the service of subject grouping in grades 6th-8th, 29.6% responded that subject grouping has been in place for 0-3 years, and another 26.8% responded that ability grouping has been in place for more than 10 years. Using a consultant to support the classroom teachers has been in place for 0-3 years by 22.5% of the districts.
At grades 6-8, three services were selected under the category of program interventions with percentages greater than 10%. They were: identified early admission/grade advancement, (31%), providing honors classes, (22.5%), and utilization of a program model, (19.7%). For the program intervention of early admission, 11.3% of respondents checked that this service has been in place for 0-3 years, 15.5% checked that this service has been in place for more than 10 years, and 67.6% did not respond. For the program intervention of providing honors classes at grades 6-8, 79% of respondents did not indicate how many years this service has been in place, 8.5% indicated 0-3 years, and 8.5% indicated greater than 10 years. How long a program model has been in place was left unanswered by 83% of respondents; however, 8.5% indicated that that program intervention has been in place greater than 10 years, and another 4.2% indicated that it has been in place 0-3 years.

Under the category of content modifications for grade levels 6-8, services selected by respondents receiving percentages greater than 10% were individualized assignments/projects (63.4%), providing accelerated content a minimum of one grade level above student placement (60.6%), using student contracts (53.5%), testing out of material prior to instruction (pre-assessment) (50.7%), utilization of a packaged curriculum (40.8%), integrating competitions in daily classroom work (40.8%), integrating across subject areas with a theme or concept (38%), and continuous progress (moving through regular curriculum at own pace) (31%). Due to each content modification in grades, 6-8, receiving percentages of greater than 10% for 0-3 years and greater than 10 years, data is presented in the following table. Table 22 displays the
percent response greater than 10 percent for years reported by content modification for grade levels, 6-8.

Table 22

**Percentage Response Rate for Content Modification by Length of Service Use**

<table>
<thead>
<tr>
<th>Content Modification, grades 6-8</th>
<th>0 - 3</th>
<th>4 - 9</th>
<th>greater than 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Assignments</td>
<td>26.8</td>
<td>&lt;10</td>
<td>14.1</td>
</tr>
<tr>
<td>Packaged Curriculum</td>
<td>25.4</td>
<td>&lt;10</td>
<td>&lt;10</td>
</tr>
<tr>
<td>Continuous Progress</td>
<td>15.5</td>
<td>&lt;10</td>
<td>&lt;10</td>
</tr>
<tr>
<td>Pre-assessment</td>
<td>25.4</td>
<td>&lt;10</td>
<td>&lt;10</td>
</tr>
<tr>
<td>Accelerated content</td>
<td>29.6</td>
<td>&lt;10</td>
<td>19.7</td>
</tr>
<tr>
<td>Thematic/Conceptual Integration</td>
<td>14.1</td>
<td>&lt;10</td>
<td>11.3</td>
</tr>
<tr>
<td>Student contracts</td>
<td>29.6</td>
<td>&lt;10</td>
<td>11.3</td>
</tr>
<tr>
<td>Incorporating competition</td>
<td>22.5</td>
<td>&lt;10</td>
<td>&lt;10</td>
</tr>
</tbody>
</table>

**Service categories: Learning environment, program interventions, and content modifications for grades 9-12**

In high school (grades 9-12), respondents selected one service under the category of learning environment greater than 10%. The service of subject grouping received 45.1%. In terms of length of years this learning environment service has been in place, 93% of the respondents did not list a time length.

The four program interventions at the high school level with the greatest percentage of responses were: offering Advanced Placement (AP) courses, (95.8%),
offering Honors courses, (94.4%), offering dual enrollment courses (students take classes at a community college for college and high school credit), (69%), and offering mentorships, (46.5%). For the above listed program interventions at the high school level, the respective length of time each intervention has been in place was cited as 1) honors classes, 0-3 years (11.3%), 4-6 years (14.1%), and greater than 10 years, (53.5%), 2) AP courses, 0-3 years (11.3%), 4-6 years (15.5%), greater than 10 years (49.3%), 3) Dual enrollment, 4-6 years (15.5%), greater than 10 years (31%), and 4) mentorships, 0-3 years 12.7%, 4-6 years (11.3%), and greater than 10 years (12.7%).

All content modifications at the high school level had percentages greater than 10%. In descending order they were as follows: Individual assignments/projects (49.3%), accelerated content (47.9%), student contracts (25.4%), continuous progress (19.7%), using competitions in daily work (18.3%), pre-assessment (16.9%), utilization of a packaged curriculum (15.5%), and integration of content between subject areas (12.7%). With regard to number of years each content modification had been in place, each content area had been in place greater than 10 years.

Survey section II: Supporting and Impeding structures

Two questions in Section II of the survey asked respondents to explore those structures perceived as supporting or impeding the implementation of a local plan for gifted education. Respondents were provided with a selection of twelve choices for supporting structures and ten choices for impeding structures and were asked to check as many factors as applied in their school district. Frequency counts were run. In order to determine some possible factors at play, following frequency counts, a chi-square analysis (alpha level < .05) was used with district type and with the way change is
perceived to occur (i.e., top down, bottom up, or mix of both). Cross tabulations were
done between supporting structures and year of implementing a local plan for gifted
education.

Support Structures

Question C in Section II of the survey asked respondents to indicate the support
structures that they used for implementing a local plan for gifted education. Choices
given were as follows: 1) school level administrative support, 2) district level
administrative support, 3) other school districts' coordinators' support, 4) some teachers
implement new plan, 5) system-wide teacher implementation of plan, 6) higher education
assistance, 7) state department assistance, 8) strong staff development, 9) local political
philosophy, 10) differentiated curriculum, 11) parental support, and 12) specific budget.
Frequency counts were run. Table 23 displays the frequencies and percentages given by
respondents for supporting structures.

Table 23

Supporting factors for implementation of a local plan for gifted education

<table>
<thead>
<tr>
<th>Supporting Structures</th>
<th>Frequency (n)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative support (school level)</td>
<td>63</td>
<td>88.7%</td>
</tr>
<tr>
<td>Administrative support (district level)</td>
<td>68</td>
<td>95.8%</td>
</tr>
<tr>
<td>Other school districts' coordinators support</td>
<td>25</td>
<td>35.2%</td>
</tr>
<tr>
<td>Some teachers implement our local plan</td>
<td>41</td>
<td>57.7%</td>
</tr>
</tbody>
</table>

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The four supporting structures receiving the greatest percentages were district level administrative support, 95.8% (N=68), school level administrative support, 88.7% (N=63), differentiated curriculum, 78.9% (N=56), and strong staff development, 69% (N=49). The least frequently reported support structures were local political philosophy, 23.9% (N=17), and higher education assistance, 25.4% (N=18), system-wide teacher implementation of local plan 35.2% (N=25), and other school districts’ coordinators support, 49.3% (N=35).

A chi-square analysis was conducted comparing frequency of reported support structures with district type as a grouping variable. Using a Pearson chi-square ($\chi^2$) ($p<.05$), there was no statistically significant relationship between district type and supporting structures for all reported supporting structures.

A chi-square analysis was conducted comparing frequency of reported support structures with the way change is perceived to occur at the district level as a grouping variable. Using a Pearson chi-square ($\chi^2$) ($p<.05$), there was no statistically significant

<table>
<thead>
<tr>
<th>Supporting Structure</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>System-wide teacher implementation of plan</td>
<td>35</td>
<td>49.3%</td>
</tr>
<tr>
<td>Higher education assistance</td>
<td>18</td>
<td>25.4%</td>
</tr>
<tr>
<td>State department assistance</td>
<td>44</td>
<td>62.0%</td>
</tr>
<tr>
<td>Strong staff development</td>
<td>49</td>
<td>69.0%</td>
</tr>
<tr>
<td>Local political philosophy</td>
<td>17</td>
<td>23.9%</td>
</tr>
<tr>
<td>Differentiated curriculum</td>
<td>56</td>
<td>78.9%</td>
</tr>
<tr>
<td>Parental support/network</td>
<td>44</td>
<td>62.0%</td>
</tr>
<tr>
<td>Specific budget</td>
<td>47</td>
<td>66.2%</td>
</tr>
</tbody>
</table>
relationship between the way change is perceived to occur and supporting structures for all reported supporting structures.

A crosstab analysis was done between the year of implementation and supporting structures. Results indicated that with regard to the specific support structures of district level administration and staff development, the count was higher than expected for years 1996-97 and 1997-98, indicating that in earlier years there was more support at the district level for implementation of a new gifted plan than might be expected statistically.

Impeding Structures

Question D of Section II in the survey asked respondents to check any barriers or impeding structures that they experienced in implementing a local plan for gifted education. Choices provided were as follows: (a) school level administration, (b) district level administration, (c) decisions made hastily, (d) limited staff development, (e) lack of parental support, (f) lack of teachers' capacity to change, (g) state department, (h) local political philosophy, (i) no specific budget, and (j) lack of differentiated curriculum. Frequency counts were run. Table 24 displays the frequencies and percentages given by respondents for impeding structures.

Table 24 displays the four impeding structures which received the greatest percentages. They were: lack of teachers' capacity to change, 73.2% (N=54), lack of a differentiated curriculum, 50.7% (N=36), limited staff development, 40.8% (N=29), and school level administration, 32.4% (N=23). The least frequently cited impediments were district level administration, 11.3% (N=8), decisions made hastily, 14.1% (N=10), and local political philosophy, 14.1% (N=10).
Table 24

**Impeding structures for implementation of a local plan for gifted education**

<table>
<thead>
<tr>
<th>Impeding Structure</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative (school level)</td>
<td>23</td>
<td>32.4%</td>
</tr>
<tr>
<td>Administrative (district level)</td>
<td>8</td>
<td>11.3%</td>
</tr>
<tr>
<td>Decisions made hastily</td>
<td>10</td>
<td>14.1%</td>
</tr>
<tr>
<td>Limited staff development</td>
<td>29</td>
<td>40.8%</td>
</tr>
<tr>
<td>Lack of parental support network</td>
<td>13</td>
<td>18.3%</td>
</tr>
<tr>
<td>Lack of teachers’ capacity to change</td>
<td>52</td>
<td>73.2%</td>
</tr>
<tr>
<td>No state department assistance</td>
<td>13</td>
<td>18.3%</td>
</tr>
<tr>
<td>Local political philosophy</td>
<td>10</td>
<td>14.1%</td>
</tr>
<tr>
<td>No specific budget</td>
<td>17</td>
<td>23.9%</td>
</tr>
<tr>
<td>Lack of differentiated curriculum</td>
<td>36</td>
<td>50.7%</td>
</tr>
</tbody>
</table>

Crosstabulations were run between district type and the four most frequently cited impeding variables. Lack of teachers’ capacity to change was the only impediment which held more than five responses in each cell. A chi-square analysis ($p < .05$) was run on that specific impediment, and it was found not to be statistically significant, based on an alpha level of .05. Table 25 shows the crosstabulation and chi square analysis.
Table 25

**Impeding structure #6: Lack of teachers' capacity to change and district type**

<table>
<thead>
<tr>
<th>District Type</th>
<th>Suburban</th>
<th>Urban</th>
<th>Rural</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Barrier</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Count</td>
<td>4</td>
<td>0</td>
<td>15</td>
<td>19</td>
</tr>
<tr>
<td>Expected count</td>
<td>3.2</td>
<td>2.1</td>
<td>13.6</td>
<td>19</td>
</tr>
<tr>
<td>Barrier</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Count</td>
<td>8</td>
<td>8</td>
<td>36</td>
<td>52</td>
</tr>
<tr>
<td>Expected count</td>
<td>8.8</td>
<td>5.9</td>
<td>37.4</td>
<td>52</td>
</tr>
<tr>
<td>Total</td>
<td>12</td>
<td>8</td>
<td>51</td>
<td>71</td>
</tr>
<tr>
<td>Expected count</td>
<td>12</td>
<td>8</td>
<td>51</td>
<td>71</td>
</tr>
</tbody>
</table>

**Chi-Square Tests**

<table>
<thead>
<tr>
<th>Value</th>
<th>df</th>
<th>Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.370</td>
<td>2</td>
<td>.185</td>
</tr>
</tbody>
</table>

Crosstabulations were run between the year of implementation and the two most frequently cited barriers. A chi square (p < .05) analysis was run on the two impeding structures in which there were more than five responses in each cell, lack of teachers' capacity to change and lack of a differentiated curriculum. Both were found to be not statistically significant by implementation year. Table 26 displays the chi square analysis between the impeding structure, lack of teachers' capacity to change, and the implementation year.
Table 26

**Impeding structure # 6: Lack of teachers' capacity to change and implementation year**

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Year of Plan</th>
<th>1996-97</th>
<th>1997-98</th>
<th>1998-99</th>
<th>1999-00</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Barrier</td>
<td>Count</td>
<td>4</td>
<td>6</td>
<td>8</td>
<td>1</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>Expected ct</td>
<td>3.2</td>
<td>3.7</td>
<td>11.2</td>
<td>.5</td>
<td>19</td>
</tr>
<tr>
<td>Barrier</td>
<td>Count</td>
<td>8</td>
<td>8</td>
<td>34</td>
<td>1</td>
<td>51</td>
</tr>
<tr>
<td></td>
<td>Expected ct</td>
<td>8.1</td>
<td>10.3</td>
<td>30.8</td>
<td>1.5</td>
<td>51</td>
</tr>
<tr>
<td>Total</td>
<td>Count</td>
<td>12</td>
<td>14</td>
<td>42</td>
<td>2</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td>Expected ct</td>
<td>11.3</td>
<td>14.0</td>
<td>42.0</td>
<td>2.0</td>
<td>70.0</td>
</tr>
</tbody>
</table>

**Chi-Square Tests**

<table>
<thead>
<tr>
<th></th>
<th>Value</th>
<th>df</th>
<th>Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pearson Chi-Square</td>
<td>4.307</td>
<td>4</td>
<td>.366</td>
</tr>
</tbody>
</table>

Table 27 displays the chi square analysis between the impeding structure, lack of differentiated curriculum, and implementation year.

Table 27

**Impeding structure # 10: Lack of a differentiated curriculum and implementation year**

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Year of Plan</th>
<th>1996-97</th>
<th>1997-98</th>
<th>1998-99</th>
<th>1999-00</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Barrier</td>
<td>Count</td>
<td>7</td>
<td>8</td>
<td>19</td>
<td>1</td>
<td>35</td>
</tr>
</tbody>
</table>
The year of implementation appears to be independent of the lack of teachers’ capacity to change or the lack of a differentiated curriculum.

Survey section III: State-initiated school reform activities

Section III of the survey asked respondents to rank order responses to three questions under the construct of state-initiated school reform. A final question asked respondents to select a number using a Likert scale on the extent to which state-initiated school reform efforts have detracted or assisted implementation of their local plan for gifted education. The first question asked respondents to select the three most powerful forces affecting the delivery of gifted services in the state within the last three years. Eleven choices were provided. Choices provided were as follows: middle school reform, change in state funding for education, change in state funding for gifted education, change in state law (Article 9B-requiring local plans for gifted education), ABC’s (accountability, basics, local control), site-based decision making, standard course of study, end-of-grade (EOG) and end-of-course (EOC) state assessment, national reports,
parental demands for increased services, and political philosophy. Frequency counts were run and Table 28 displays the range of responses.

Following frequency counts for the most powerful state-initiated reform efforts affecting the delivery of gifted services in North Carolina, the majority of survey respondents (53%) selected the change in state law, Article 9B, as the most powerful reform effort affecting gifted education. The North Carolina accountability plan, ABC’s, which is the overarching reform effort encompassing accountability, basics, and local control as its primary initiative, was seen as the second most powerful reform effort with 35.2% of respondents. The third most powerful influence selected was the EOGs and EOCs testing, selected by 23.9% of the respondents. The North Carolina testing program, EOG and EOC, are outgrowths of the ABC initiative. The testing program is the accountability benchmark for the legislature.

Table 28

<table>
<thead>
<tr>
<th>State reform efforts</th>
<th>Most powerful</th>
<th>2nd most powerful</th>
<th>3rd most powerful</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Middle school reform</td>
<td>3</td>
<td>4.2%</td>
<td>N/A</td>
</tr>
<tr>
<td>Funding change in education</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Funding change in gifted education</td>
<td>6</td>
<td>8.5%</td>
<td>7</td>
</tr>
<tr>
<td>Change in state law (Article 9B)</td>
<td>38</td>
<td>53.5%</td>
<td>13</td>
</tr>
<tr>
<td>ABC’s</td>
<td>12</td>
<td>16.9%</td>
<td>25</td>
</tr>
</tbody>
</table>
The second question asked respondents to select the three areas in their current gifted program most affected by state-initiated school reform efforts. Twelve choices were provided. The twelve choices were as follows: representation of culturally diverse students in gifted program, funding for gifted program, overall professional training for teachers in gifted, an identifiable individual in charge of program, assessing academic growth for gifted students, mastery of subject area disciplines among teachers of the gifted, more teachers endorsed in gifted education, adoption of differentiated curriculum, overall professional training for administrators in gifted, off-level testing to assess academic growth, expanded array of services, increased areas of giftedness being served. Frequency counts were run. Table 29 displays the three areas in the school district's local gifted program most affected by state-initiated school reform efforts.
Table 29

<table>
<thead>
<tr>
<th>Local areas in gifted program impacted by state reform efforts</th>
<th>Most Affected</th>
<th>2\textsuperscript{nd} most affected</th>
<th>3\textsuperscript{rd} most affected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culturally diverse representation in program</td>
<td>N 5, % 7.0%</td>
<td>N 8, % 11.3%</td>
<td>N 10, % 14.1%</td>
</tr>
<tr>
<td>Funding for gifted education</td>
<td>N 11, % 15.5%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Staff development for teachers</td>
<td>N 25, % 35.2%</td>
<td>N 12, % 16.9%</td>
<td>N 5, % 7.0%</td>
</tr>
<tr>
<td>Individual in charge of program</td>
<td>N 10, % 14.1%</td>
<td>N 6, % 8.5%</td>
<td>N 5, % 7.0%</td>
</tr>
<tr>
<td>Assessing academic growth</td>
<td>N 3, % 4.2%</td>
<td>N 6, % 8.5%</td>
<td>N 10, % 14.1%</td>
</tr>
<tr>
<td>Subject area mastery for gifted teachers</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Increased number of teachers endorsed in gifted education</td>
<td>N 6, % 8.5%</td>
<td>N 16, % 22.5%</td>
<td>N 10, % 14.1%</td>
</tr>
<tr>
<td>Adoption of differentiated curriculum</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Staff development for administrators</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Off-level testing to gifted students</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Expanded array of services</td>
<td>N 7, % 9.9%</td>
<td>N 7, % 9.9%</td>
<td>N 6, % 8.5%</td>
</tr>
</tbody>
</table>
The area most affected in current local gifted programs by state reform efforts according to respondents was staff development for teachers, 35.2% (N=25). The second most affected area was increased numbers of teachers being endorsed in gifted education, 22.5% (N=16). There were three areas in the local gifted program affected by state reform efforts receiving the same percentages as 3rd most affected. The responses of representation of culturally diverse students in the gifted program, assessing academic growth in gifted students, and increased numbers of teachers receiving gifted endorsements, each received 14.1% (N=10) response.

The third question in Section III in relation to state-initiated school reform efforts asked for ranking preferences surrounding three areas in their gifted program that are in the greatest need of attention, in order for their program to be optimal. Table 30 displays all ranking results. The area cited as in need of the greatest attention in local gifted programs in order to be optimal was funding for gifted education, 50.7% (N=36). The second greatest area needed for local gifted programs to be optimal was adoption of a differentiated curriculum in the gifted program, 26.8% (N=19), and the third area selected by respondents as needed for local gifted programs to be optimal was adoption of a differentiated curriculum in the gifted program, 19.7% (N=14).

An additional layer of analysis was considered for the three questions on state-initiated reform efforts. The researcher looked across the ranking categories in addition to frequency of a selected preferential ranking as noted in Tables 28, 29, and 30. Considering each reform effort and taking the summation of a particular reform effort...
across first, second, and third choice responses, added another dimension to the respondents selections. For the first question in Section III which asked respondents to select the three most powerful forces affecting the delivery of gifted services in the state within the last three years, by collapsing the ranking categories, the three most prevalent answers in descending order of total percentages across were the same as provided by the frequency counts noted in Table 28: Article 9B, state ABC’s, and the testing program EOG’s.

For the second question in Section III, the area most affected in current local gifted programs by state reform efforts, (Table 29) by collapsing the ranking across categories a slightly different picture emerged with responses. Two of the three answers provided by the frequency counts remained the same, professional development and numbers of teachers endorsed in gifted education. However, the third highest percentage across was the increase of a culturally diverse population in the gifted program. Lastly, the third question which local areas in the respondents gifted program needed to be addressed for their program to be optimal. Table 30 displays the frequency counts within each ranking order. Looking across all three ranking areas of need, the category perceived to be most needed was funding (67.6%), secondly was adoption of a differentiated curriculum (52.1%), and third was a need for additional professional development (49%).
Table 30

Local areas in need of attention to be optimal

<table>
<thead>
<tr>
<th>Local area in need to be optimal</th>
<th>Greatest need</th>
<th>2nd greatest need</th>
<th>3rd greatest need</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Representation of culturally diverse in program</td>
<td>8</td>
<td>11.3%</td>
<td>8</td>
</tr>
<tr>
<td>Funding for gifted education</td>
<td>36</td>
<td>50.7%</td>
<td>5</td>
</tr>
<tr>
<td>Staff development for teachers</td>
<td>12</td>
<td>16.9%</td>
<td>15</td>
</tr>
<tr>
<td>An identifiable individual in charge of program</td>
<td>1</td>
<td>1.4%</td>
<td>5</td>
</tr>
<tr>
<td>Assessing academic growth</td>
<td>1</td>
<td>1.4%</td>
<td>1</td>
</tr>
<tr>
<td>Subject area mastery for gifted teachers</td>
<td>N/A</td>
<td>N/A</td>
<td>1</td>
</tr>
<tr>
<td>More teachers endorsed in gifted education</td>
<td>3</td>
<td>4.2%</td>
<td>8</td>
</tr>
<tr>
<td>Adoption of differentiated curriculum</td>
<td>4</td>
<td>5.6%</td>
<td>19</td>
</tr>
<tr>
<td>Staff development for administrators</td>
<td>3</td>
<td>4.2%</td>
<td>3</td>
</tr>
<tr>
<td>Off-level testing</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Expanded array of services</td>
<td>2</td>
<td>2.8%</td>
<td>2</td>
</tr>
</tbody>
</table>
The final question relating to state-initiated school reform efforts asked respondents to select, using a Likert scale, to what extent they perceived that state-initiated school reform efforts detracted or assisted implementation of their local gifted plan. Due to the importance of this question in relation to the research questions and literature review, three analyses were conducted. A frequency distribution was run to determine the number of responses per interval data. The range provided was 1 = strongly detracted, 2 = partially detracted, 3 = neither detracted/assisted, 4 = strongly assisted, 5 = totally assisted.

Secondly, mean scores were run using how respondents perceive change to occur in their school districts (Survey question IV G) as a grouping variable. An ANOVA was also run state-initiated reform efforts using urban, suburban, and rural school districts. No statistical significance was found between district types and perceived assistance/detraction of state-initiated reform efforts on local gifted plans.

Table 31 displays the frequency responses. In descending order, over 43% (N=31) selected that state reform efforts neither detracted or assisted in implementing a local gifted plan, 35% (N=25) responded that state reform efforts partially assisted in implementing a local plan, 14.1% (N=10) indicated that state efforts partially detracted from the implementation of the local plan, 4.2% (N=3) indicated that state reform efforts strongly detracted, and 2.8% (N=2) responded that state-initiated reform efforts strongly assisted implementation of their local gifted plan.
Table 31

State reform efforts on local gifted plans

<table>
<thead>
<tr>
<th>Scale</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly detract</td>
<td>3</td>
<td>4.2</td>
</tr>
<tr>
<td>Partially detract</td>
<td>10</td>
<td>14.1</td>
</tr>
<tr>
<td>Neither detract nor assist</td>
<td>31</td>
<td>43.7</td>
</tr>
<tr>
<td>Partially assist</td>
<td>25</td>
<td>35.2</td>
</tr>
<tr>
<td>Strongly assist</td>
<td>2</td>
<td>2.8</td>
</tr>
<tr>
<td>Total</td>
<td>71</td>
<td>100</td>
</tr>
</tbody>
</table>

Table 32 shows that the mean scores for the respondents using a Likert scale who perceive that educational changes occur in their school district as a mix of bottom up and top down efforts were slightly greater in the direction of state efforts assisting the local district’s implementation efforts. The group mean scores for those respondents who perceive that change occurs in their school district primarily top down were in the direction of state efforts detracting a local district’s implementation efforts.

Table 32

Means on Likert Scale and Standard Deviations for respondents who perceive that change occurs top-down or a mix of top-down and bottom-up

<table>
<thead>
<tr>
<th>State efforts</th>
<th>Group</th>
<th>Number</th>
<th>x</th>
<th>sd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top down</td>
<td>22</td>
<td>2.96</td>
<td>.99</td>
<td></td>
</tr>
</tbody>
</table>
An ANOVA was conducted (Table 33) to examine the effect of district types on the degree to which state reform efforts detract or assist local implementation efforts. The data indicate that no statistically significant relationship was present at $p < .05$ between district types and the degree to which state reform efforts assist or detract local district's implementation of a gifted plan.

Table 33

Analysis of Variance by district type

<table>
<thead>
<tr>
<th>State efforts</th>
<th>SS</th>
<th>DF</th>
<th>MS</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between groups</td>
<td>2.017</td>
<td>2</td>
<td>1.008</td>
<td>1.355</td>
</tr>
<tr>
<td>Within groups</td>
<td>50.603</td>
<td>68</td>
<td>.744</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>52.620</td>
<td>70</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Survey Section IV: Educational change

The final section in the survey explored issues surrounding how educational changes occur in school districts as perceived by the respondents. Five questions from Section IV asked respondents to indicate responses regarding how educational changes occur in their school district.

The first question, using a Likert scale, asked respondents to indicate to what extent their gifted program is integrated with other system-wide initiatives. The second question, using a Likert scale, asked respondents to what extent their school system
administration support new educational initiatives. The third question asked respondents to select all the ways in which their school district involves classroom teachers in making educational changes. This question used a list of six ways and allowed respondents to indicate any that apply. The six choices provided were: establishing system-wide curriculum committees, providing staff development in the school district, using surveys or questionnaires, having teachers involved in strategic planning, allowing teachers to provide feedback to their principals, or having teachers only responsible for what occurs in their classroom. The fourth question asked respondents to indicate the educational context that they perceive has the greatest impact for gifted learners. The provided contexts correspond with each layer of the conceptual framework. The layers provided were: the classroom, the curriculum within the school, the school culture, the school system, parents and/or community, admissions criteria for college, alliances among educators, and educational goals set by the state. The final question in Section IV asked respondents to select the way educational changes occur in their school district. Choices provided were that changes occur top-down, changes occur bottom-up, or changes occur as a mix of top-down and bottom-up. The following paragraphs explore more specific aspects of educational change as it relates to other aspects embedded in the survey.

In order to consider the relationship between the way educational change occurs and the degree to which the local gifted program is integrated within the school system context, crosstabsulations were run initially, followed by an independent t-test to compare means and check generalizability on the questions of program integration and administrative support of new educational initiatives using the question on educational change as a grouping variable. Table 34 displays the results.
Table 34 displays the crosstabs results using the way change is perceived to occur as the grouping variable. The group which responded that educational change occurs as a mix of top-down and bottom-up efforts also perceived that their local gifted program is strongly integrated within the larger school system context (82.1%). This differs from the group that responded change occurs in their districts predominantly as top-down efforts. They perceived that their gifted program was not as strongly integrated in the larger school system context (14.3%). Following the crosstab analysis, an independent t-test
was run to check for significance between groups. Following are the t-test results in Table 35.

Table 35

Means and Standard Deviations for perceived change

<table>
<thead>
<tr>
<th>Change</th>
<th>N</th>
<th>Mean</th>
<th>Std. Deviation</th>
<th>Std. Error Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Down</td>
<td>22</td>
<td>3.045</td>
<td>.785</td>
<td>.167</td>
</tr>
<tr>
<td>Mix of Both</td>
<td>47</td>
<td>3.489</td>
<td>.905</td>
<td>.132</td>
</tr>
</tbody>
</table>

Independent Samples Test Program Integration

<table>
<thead>
<tr>
<th>Levene’s F</th>
<th>Sig.</th>
<th>t</th>
<th>df</th>
<th>sig</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.045</td>
<td>.085</td>
<td>-1.975</td>
<td>67</td>
<td>.052</td>
</tr>
</tbody>
</table>

These results showed that there were not significant differences between the groups for the way the local gifted program is perceived to be integrated within the larger school system. This meant that for both groups in which educational change occurs top down and as a mix of top down and bottom up, how change occurs was not significant in respect to the integration of the local gifted program to the larger school system.

Two questions in the final section of the survey were analyzed using frequency distributions. A frequency count was tabulated on the ways in which school districts involved classroom teachers in the overall implementation efforts. Table 36 displays the frequencies for involving teachers in implementation changes in the school district. In
descending order of percentages, the most frequently reported ways that teachers involvement was seen were: staff development, 87% (N=62), system-wide curriculum committees, 83% (N=59), feedback to principals, 80% (N=57), participation with system’s strategic planning, 65% (N=46), involvement through survey/questionnaire usage 55% (N=39), and teachers were only responsible for what occurs in their classroom 2.8% (N=2). The results suggest that staff development was the predominant method for involving teachers in implementation efforts.

Table 36

<table>
<thead>
<tr>
<th>Ways teachers are involved with implementation efforts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Involvement strategies</td>
</tr>
<tr>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>System-wide curriculum committees</td>
</tr>
<tr>
<td>Staff development</td>
</tr>
<tr>
<td>Survey/Questionnaire to teachers</td>
</tr>
<tr>
<td>Involved in district’s strategic planning efforts</td>
</tr>
<tr>
<td>Informal feedback through school principals</td>
</tr>
<tr>
<td>Only responsible for classroom</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

A frequency count was done to examine which educational context respondents perceived has the greatest impact on gifted learners. The provided contexts correspond with each layer of the conceptual framework. The layers provided were the classroom, the curriculum within the school, the school culture, the school system, parents and/or community, admissions criteria for college, alliances among educators, and educational
goals set by the state. Table 37 indicated that for 38% of survey respondents what occurs in the classroom has the greatest impact on gifted learners. Other contexts impacting gifted learners were the school system (18.3%), the curriculum (11.3%), and equal respondents said school culture and educational goals set by the state (9.9%).

Table 37

<table>
<thead>
<tr>
<th>Context</th>
<th>n</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom</td>
<td>27</td>
<td>38.0</td>
</tr>
<tr>
<td>Curriculum</td>
<td>8</td>
<td>11.3</td>
</tr>
<tr>
<td>School culture</td>
<td>7</td>
<td>9.9</td>
</tr>
<tr>
<td>School system</td>
<td>13</td>
<td>18.3</td>
</tr>
<tr>
<td>Community</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>College admissions criteria</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Educators networks</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Educational goals set by state</td>
<td>7</td>
<td>9.9</td>
</tr>
<tr>
<td>Total</td>
<td>62</td>
<td>87.4</td>
</tr>
</tbody>
</table>

Note: Nine respondents did not answer this question.

Summary of Phase I Survey Findings

The survey had four main sections used to answer each research question.

Descriptive statistics were used to analyze the survey. The questions in Section II (current gifted program) of the survey represented the eight components of Article 9B, statute §115C-150.7, that the North Carolina State Board of Education mandated to be included in every local school system gifted plan.
Survey findings reveal every subcomponent of Article 9B has been implemented to varying degrees. All school districts involved multiple stakeholder groups in the development, planning, and implementing stages of the local plan for gifted education. Survey respondents (85%) indicated that due to the implementation of Article 9B, services for gifted students had changed. Every survey respondent indicated some or significant impact from the implementation of Article 9B. In order to implement a new local plan for gifted education, respondents selected administration at the school and district levels as well as staff development as prevalent supporting structures. Conversely, respondents cited teachers’ lack of capacity to change, lack of staff development and school level supporting as impediments. There was no statistically significant relationship between district types with regard to supporting or impeding structures.

In terms of state reform efforts’ impact on local districts, respondents selected the change in law (Article 9B) which mandated local plans, the state-initiated reform effort to raise achievement standards entitled the ABC’s, and the state testing program (EOG/EOC) as the greatest impacts on their local gifted program. The largest change that has occurred due to the implementation of local plans was staff development and the area in need of greatest attention was funding.

Phase II Findings: Telephone interviews (survey subgroup)

The second phase of the study involved collecting qualitative data through telephone and email interviews conducted with a subgroup of survey respondents. The procedure employed by the researcher was calling a stratified random sample of 15% of survey respondents based on respondent-classified school district type. Calling back or resending an email attachment was conducted for a minimum of two attempts. If a district
type did not respond, the researcher would randomly select another district to call based upon the same classification. Interview questions (see Appendix C) were derived from the findings from the survey instrument as well as the major research questions. The researcher conducted ten telephone interviews and one email correspondence. The distribution of district types for telephone interviews (N=11) were five rural, three suburban, and three urban school districts. Telephone and/or email interviews formed a rich data source to further probe perceptions from a subgroup of survey respondents surrounding implementation efforts of Article 9B. The findings reported for this phase of the study are reported by interview question. Appendix E shows the responses by district type per interview question. Each question is explored by themes and the summary of this study phase section concludes with categories derived by grouping the themes across interview questions.

Phase II: Telephone interviews content analysis

The telephone and email interview data analysis was completed on the basis of inductive methods of unitizing and categorizing (Lincoln & Guba, 1985). Eleven interviews were held, averaging 45 minutes each. The narrative responses were initially read by the researcher individually, with each interview read as a unit, and with attention to general impressions. Then the transcribed responses were organized so that all answers to each question were grouped together by district type. These grouped responses were then analyzed by the unitized frequency of word counts and the inductive process of emerging patterns and themes based upon the similarity of response meanings. Half of the questions were open-ended and were intended to generate narrative data. The other half asked participants to make a choice or other brief responses. Subsequently, the
researcher compared transcriptions across interview questions using a process by which “data emerge that fit an existing category” (Glaser & Strauss, 1967). Emerging themes and patterns were clustered under broader categories. The summary section of Phase II considers the categorical representation of emerged themes across interview questions. (See Appendix E for table of responses by district type).

**Phase II: Telephone interview question 1**

Interview Question 1 asked to what extent do they (interview respondents) perceive that the implementation of Article 9B (local gifted plan) has taken place. As participants’ responses were identified in the interview transcripts and word counts and meanings were noted, themes began to emerge for interview question 1. Three themes emerged with regard to this question. The three themes were noted as complete implementation, moderate implementation, and partial implementation.

- **Complete implementation**—responses included ideas and references to fully implemented service options available throughout grades K-12, and establishing and reaching annual goals for implementation. As one rural school district indicated, “It has been fully implemented. Our plan has been designed and implemented over three years. We have the support of our local school board and we are doing what we say we are doing, K-12.” Another rural school district indicated, “When we sat down to write our plan, we actually set up six goals and with each goal, we had yearly measures. So far, we’re on target.”

- **Moderate implementation**—responses included open optimism surrounding implementation efforts with a degree of caution. Comments included that
although most of the plan was implemented, some plan components were not in
place yet and still needed improvement.

An urban school district responded, "We're almost there, but we still need to improve in
areas like communication and enforcement. Overall, we are keeping true to what we said
we were going to do. We did a survey this year on how we're doing and received
positive feedback but one of the parent concerns was that the gifted students needed an
advocate." Three school districts felt that the K-2 component was still lacking
implementation and sentiment was summed up with this rural school district comment,
"We have fully implemented our gifted plan in the academic disciplines of math and
language arts for grades 3-12, but our K-2 component has not been fully implemented.
In 2000-2001, it will be if we have available resources."

- Partial implementation-responses included a tone of concern about garnering
  support for implementation efforts. Answers focused on only one or two areas of
  changes made, rather than a broad array of changes with regard to implementation
efforts.

This rural school district response is representative, "We still have some education
needs for teachers and principals. Many of our teachers and administrators still see the
AG (academically gifted) teacher as the program, instead of AG being part of the whole
school program." A suburban school district responded, "We have regular classroom
teachers seeking endorsement and we pay them a stipend and pay for the courses. As a
result, they are expected to differentiate in the classroom." A suburban school district
only referred to the change in identification procedures, "We now use multiple criteria for
identification in order to represent diverse backgrounds."
Phase II: Telephone interview question 2

Interview Question 2 asked interview respondents how service options for gifted learners have changed since the implementation of their local gifted plan. A related sub-question asked if they thought that the year of implementation had any bearing on the extent to which changes have been made. As participants’ responses were identified in the interview transcripts and word counts and meanings were noted, themes began to emerge for interview question 2. The subquestion concerning whether the year has any bearing on service implementation either did not receive a response or the inferences made were a phasing in of services and awareness levels among stakeholder groups over a series of years. Two themes that emerged across district types were focused services, and services stayed the same but other aspects of the plan changed.

- **Focused services**—responses included adding components to their gifted program, such as K-2 or a specific population of gifted learners.

An example of this was expressed by an urban district, “We added a component to serve profoundly gifted students. It was a cross district magnet at one of our schools. We would nominate students that would benefit, like the top 1%.” A rural school district answered, “We used to concentrate in language arts and now we concentrate K-12 in language arts and math.” Another urban district responded, “We added a component to serve the gifted underachiever.”

- **Services remained the same, but other program aspects changed.** Responses of this type included characteristics such as changing attitudes, formalizing an existing system, changing criteria for entrance, shifting personnel roles, or teacher training rather than service options.
"We already had many options in place; this allowed us to look at matching need to services," said an urban district, adding, "The biggest emphasis was the commitment when the consultant was in the room, the teachers were involved and not using it as a planning period. Our goal was that after the AG consultant left, the teacher would pick up the ball and know what to do." A suburban district responded, "Very little changed, but this allowed us to formalize our structure." "For us, it's a gradual saturation of awareness taking place versus a state mandated plan that's making the difference," came from a rural district. Lastly, another urban district responded, "What's different is using multiple criteria for placement. It's changing the forms and criteria, not necessarily the services."

**Phase II: Telephone interview question 3**

Interview Question 3 asked respondents to name up to three changes in their local program that have been most affected by Article 9B. Responses to the question of local changes varied across district types. The rural and suburban districts emphasized increased staff development and increased services and additional hires along with the changing role of classroom teachers and AG consultants. The urban school districts focused on changing stakeholder perceptions and attitudes as well as concentrating efforts on serving gifted minorities and having diverse student populations represented in the gifted program. Themes which emerged across district types were increased communication and buy-in among multiple stakeholder groups, changing personnel roles, and staff development.

- Increased communication—responses included references to involvement of teachers, parents, and administrators either in delivering services or supporting changes in the program.
A rural district responded, "I established a county advisory board that meets monthly. It has increased the communication going on." A suburban district shared, "We brought in a lot of parents. We brought in a lot of groups, which made our plan broadly accepted. We especially had input from classroom teachers since they were the ones who would be delivering services."

- Changing roles-responses included references to a shift in direct services to gifted students being the responsibility of the classroom teacher versus an AG specialist.

An urban district had this to say, "We changed from a pull-out model to the catalyst model because it directly impacted kids, the premise being that they are AG all the time and not once a week. It's harder for teachers to implement, but I think it's a better way to go." A rural school district responded, "Differentiation has to happen every day and so it's been brought to the front lines." A suburban district responded, "We had to push the responsibility for gifted students to all teachers, so the AG specialist job moved to collaborator or resource."

- Staff development-included responses to training personnel or commitment of personnel to seek gifted endorsement/licensure.

A suburban district said, "Staff development has been a major focus in my district and for the teachers. It's helped for buy-in because they see the carryover in their classroom with all kids." A rural district responded, "We have extended training to every school, and we have the commitment from central office for widespread staff development." An urban district responded, "Staff development to our teachers has helped them understand that a student is not necessarily gifted across the board."
Phase II: Telephone interview question 4

Interview Question 4 asked respondents to describe any supporting factors for implementing a local plan for gifted education. Overall, across districts two predominant themes emerged which were top down support, and community/parent support. One unusual response stood out from a rural school district. The supporting factor expressed by a rural district that did not fit either of the emerged themes, was a reported self-study to procure widespread district support.

- Top down support--responses included references to central office administration support, local school board, principal support or the district superintendent.

A suburban school district responded, “We are held accountable to our school board and that’s a good thing.” Another example came from an urban district, “We field tested our new plan in several schools, then the next year we increased it to other schools and had the first schools train the next group, etc. In this way, central office supported what was happening at the school level and encouraged us to keep going.”

- Community/parent support--references made to parent support or involving community through such mechanisms as an advisory board.

An urban district said, “We’re a small school system and so we have good parent support and an understanding from our community that it’s ok to be smart” A rural district responded, “Our advisory council is board-appointed and therefore has clout. I go to all the meetings, but I am not even on our local gifted advisory board.”

The rural district that had conducted the self-study also mentioned visiting the model sites prior to their own implementation. In this way, one could argue that community support emerged as a theme for them, in a broad sense. As stated by the
district, “We visited some of the model sites that the state initially set up, and we made
some changes to our own plan. Those models were a good thing and really helped the rest
of us with our plans.”

Phase II: Telephone interview question 5

Interview Question 5 asked respondents to identify impeding factors for
implementing a local plan for gifted education. Very few differences emerged across
district types. Three themes that emerged as impediments by all respondents were lack of
adequate funding, lack of personnel to appropriately implement the plan, and perceived
attitudes of stakeholders.

- Funding-patterns of responses consisted of issues relating to having greater
  numbers of identified students than funding would allow, or concerns over limited
  financial resources for materials, supplies, and purchasing curriculum resources.

“In our school district, we used Multiple Intelligences (MI) to assess student behaviors.
In order to be consistent throughout the district, it required lots of money and the AG
budget could not support that endeavor, alone,” was an urban district’s remark. A
suburban district responded, “We are so over identified that we do not have the resources
to serve the gifted students to the degree that we would like. We need to purchase
advanced curriculum and teachers, and we cannot do that.” Another suburban district
responded, “The 4% cap on funding is too little. We serve our kids out of average daily
membership (ADM) money because the gifted monies serve so few students.” A rural
district said, “We need money for materials to serve these students.” Several
respondents, regardless of district type, merely remarked in response to the interview
question, “Money.”
Personnel—typical responses related to not having adequate numbers of teachers to serve students. Additional comments included the training of personnel, teacher turnover, and disparity between schools.

A rural school district remarked, “We do not have enough personnel with training.” Another rural school district responded, “We lack staff at every level.” An urban school district said, “We get teachers endorsed in gifted, but we cannot guarantee that they will stay in our school system to teach.” Another urban district remarked, “The training needs to be there for those teachers for gifted students. Right now, the tail is wagging the dog, all the training is to bring up the test scores for the low level kids.” A suburban district shared, “We have schools with different proportions of identified gifted students and that creates problems with teacher equity and logistics of serving those students.”

Attitude—responses of this sort included teachers, school administrators, and district level administrators having difficulty changing their perceptions about meeting the needs of gifted students. Comments also included different stakeholder groups resistant to changing an existing system.

A rural school district responded, “We want flexibility, but right now we have ‘principal-doms’ in schools, and they are resistant to change.” An urban district said, “At first, parents did not like the changes because they did not think that regular classroom teachers would be able to provide appropriate differentiation.” A suburban district also shared a similar response concerning parents’ acceptance, “Parents were reluctant to accept services by the regular teacher instead of the former AG specialist.” A suburban district shared, “Some principals and central office administrators do not believe in gifted education so it is hard to change anything, but it’s the law.”
Phase II: Telephone interview question 6

Question 6 asked interviewees which state reform efforts have most powerfully impacted their local program. For several respondents, explanations defining or listing examples of state reform efforts had to be in place prior to their responses. Patterns of responses were noted and themes across district types emerged with the exception of one theme provided by urban districts and not shared by rural or suburban districts.

Responses across district types included the ABC's and the state EOG/EOC testing program. The ABC's state-initiated school reform effort represents North Carolina's focus on raising educational standards through accountability, teaching the basics (reading, mathematics, and writing), and increasing local control. The accountability measure in place is the administration of the End-of-Grade (EOG) in grades 3-8 or End-of-Course (EOC) in grades 9-12 tests. One rural district answered "none" to the question. Urban districts shared the above two response themes, but additionally addressed the issue of changes in the funding mechanism as a local impact. Interestingly, responses were mixed in terms of whether state reform efforts were viewed as positive or negative in terms of local impact.

- ABCs- responses included simply stating, "ABC's", or in the ways in which the ABC's are employed.

A rural school district responded, "ABC's, teachers say it kills creativity." Another rural district answered, "ABC's, the accountability has forced our school systems to examine growth for all students, including the gifted." An urban district shared, "The ABC's in a positive way, because it's making children accountable for themselves. The tide has changed, and students feel like they are accountable." A suburban district said, "No
question, the ABC’s, because there’s so much pressure on teachers. Teachers are frightened not to deviate from the state curriculum. What’s happening is, the AG students that know the material are forced to do the material with the rest of the students.”

Another suburban district responded, “The ABC’s is knocking us silly. The emphasis is on reaching minimum standards and not measuring the upper end kids.”

- EOG/EOC testing- responses included any references to testing or teachers’ reluctance to deviate from the testing program.

A suburban district responded, “The End of Grade testing is the 900 lb. gorilla in our living room. The testing is forcing our teachers to teach to the test. Teachers feel too insecure to teach divergent thinking activities because the scores are published.” An urban district shared, “When I try and work with teachers, they tell me, ‘I don’t have time to enrich the AG children, because I have to teach the test’.” Another urban district shared, “The state tells us not to worry about those kids scoring a 3 or 4, and just focus on the kids scoring a 1 or 2, but it makes it difficult to convince teachers to work with the AG students and appreciate their needs because they mostly score a 3 or 4.” Lastly, a rural district shared, “Teachers say the testing is killing creativity. They will not take the time to enrich students the way I think they should be doing.”

- Change in funding-two of three urban districts shared responses relating to money or changes in the way that their program was funded.

One urban district responded, “The change in the formula for funding AG has impacted our program, because we used to bring in national speakers, but now we don’t anymore and it seems like the money’s not there.” Another urban district said, “Because the
funding has changed, out of EC (Exceptional Children), I don’t feel like my money is protected.”

**Phase II: Interview question 7**

Interview Question 7 asked respondents to describe any areas in their gifted program that need further attention for their program to be optimal. As participants’ responses were identified in the interview transcripts and word counts and meanings were noted, themes began to emerge for this question. The themes which cut across district types were funding, program modifications, and personnel.

- **Funding**-responses included references to needing increased funding, assurances that funding for gifted would continue, or state specificity with regard to funding practices. An urban district reported the following, “I think our current system of using performance assessment is good and I hope that we will continue to have the money to ensure that it does not get cut.” A rural system shared the cautionary note about funding, “We need continued state and local funding because lack of which will cause our system not to be able to provide resources or materials to our students and staff.” One rural district shared, “It would be helpful if there were a state definition of how the money is to be spent because locally no one knows how the budget should be allocated.”

- **Program modifications**-responses included increasing or diversifying components of their local plan. Additional comments included references to needing an advanced curriculum or appropriate assessment techniques as part of their program.
A suburban district remarked, "We're still missing those highly gifted kids. We're putting the brakes on them and telling them to slow down. On the other end, we need to do a better job finding and serving the underachieving gifted." A rural district commented, "We still need to do a better job of matching children with services." An urban district responded, "I would still like to see an alternative school for talent development." A rural district referred to the growing demographic shift in population by responding, "We have seen a rise in our community with ESL students (English as a second language), and so we really need to make an effort to find the underserved gifted population."

References made to curricula and assessment adaptations were summed up in this suburban comment, "I need an assessment tool that helps me measure growth for gifted students so that I have data." This comment by a suburban district referred to modifying curriculum in relation to the program: "The Standard Course of Study is designed for average and below average kids. We need an articulated curriculum for the gifted students, so that they have a place to go."

- Personnel comments referred to the need to hire additional personnel either for teaching or in an administrative capacity as well as continuing provisions for staff development. An ancillary comment under the theme of personnel referred to having all personnel adhering to the same program goals.

One rural district responded, "I think that our strengths are also the areas we need to improve, such as staff development and overall hiring more folks." An urban district shared, "We could use someone at the helm who is an advocate for kids and not just what looks good on paper, so that the needs of students don't get put on the back burner." "I need more teachers, and I need to get everyone understanding the plan and aiming for the
same goal,” came from a rural district. A suburban district responded, “I need more instructional leadership for gifted at each site.”

**Phase II: Interview question 8**

The final interview question reflected each layer of the conceptual framework (McLaughlin & Talbert, 1993) and asked respondents which educational context they felt had the greatest impact on gifted learners. One theme emerged across district types, that of the classroom. However, there were clearly differences between rural and suburban, rural and urban responses, and suburban and urban responses. No other singular theme emerged. For the purposes of reporting, the researcher will refer to the differences as other educational contexts.

- Classroom - comments recorded referred to dynamics between teacher and student in a classroom.

A suburban district responded, “The classroom; the teacher drives it.” Another suburban district shared, “The classroom because that is where the students spend the most hours. The state can create a curriculum but because the teacher can choose whether or not to follow it, they have all the power.” A rural district said, “The classroom, because it is all in the hands of the teacher. If the teacher is not differentiating for gifted students, then it is not happening.” An urban district echoed the same sentiments, “I’d have to say it’s the classroom. That’s where the magic happens.”

- Other educational contexts - comments referred to any other layer of the conceptual framework, except the classroom.

Rural school districts were the only ones who provided a response of state goals to this question, as evidenced by this comment, “Educational goals set by the state have the
greatest impact because that is the context we have the least control over. We can take care of the others.” The other rural school district shared, “State goals drive everything. Our county has tested well, and the teachers are proud of it so they do not want to stray too far from what the state says we have to do.” No other district type mentioned the state goals. Urban school districts were mixed other than the one which responded with the classroom. The other two responded either with the school culture or admissions criteria to college, with this comment, “I think at the elementary level and perhaps the middle school level, it’s the classroom; but at the high school level, the thing that seems to motivate and impact these students are the admissions criteria set by colleges.” Lastly, another difference was one suburban district that responded with the school system, as follows, “I would have to say the school system because you can impact a larger group of teachers and therefore a wider range of students.”

Phase II: Summary of findings

The final type of analysis for the interviews involved integrating themes by individual and district types into broader clusters or themes. Themes were grouped and regrouped until categories formed, which incorporated and provided a picture across district types and interview questions. These broad themes which emerged across district types encompassing aspects of all interview questions were accountability, educational change, and authority.

Accountability

A major theme espoused by respondents (N=11) across questions was that of accountability. Respondents across district types felt that imposed accountability standards vis a vis state testing and the ABC’s restricted teachers and administrators in
terms of the ability to deviate and differentiate from the Standard Course of Study in order to meet gifted students’ needs. However, there were mixed responses as to whether accountability measures were viewed as positive or negative by the respondents. Perceptions of positive accountability issues came from an urban district, which responded that the students were held accountable for their learning. Negative responses included many comments related to teachers’ reluctance to stray too far from the state curriculum or to allow for creative teaching strategies. The state testing program, consisting of EOGs and EOCs as part of the overall state reform initiative (ABC’s), was seen as the predominant state reform effort impacting local programs. Many districts mentioned being held accountable to their local school board. Again, some viewed this local accountability as positive (e.g., providing clout for the program) or negative (e.g., adherence to local board policies).

**Educational change**

The theme of change was consistent across interviewee responses (N=11) regardless of question. Responses across district types and interview questions relating to educational change employed references to changing personnel perceptions or attitudes. Other educational change issues related to the literal change in state law, funding, programming, or context in which gifted students are served. Staff development was viewed as a catalyst for implementing needed educational changes. At several points, district respondents mentioned that although services may not have changed, Article 9B operationalized and legitimized existing practices. Much of the focus revolved around the changes that classroom teachers, with or without staff development, were expected to do, and the pressures teachers felt to differentiate while adhering to the state’s curriculum.
framework. Interestingly, staff development emerged as a theme with regard to local changes that had taken place, yet, staff development did not emerge as a theme for supporting factors.

Authority

The theme of where authority resides in making change was evident across the interviewees (N=11) and the questions asked. Authority was inherent in references to local and state control. School level administrators (i.e. principals) were listed as supporting as well as impeding structures for implementing a local plan. Yet, district level administrators, school board members, and the superintendent were described as supporting factors in order to implement a local plan for gifted education. Although there were references to awareness of educational goals set by the state as authority, the predominant response to which context has the greatest impact on gifted learners was the classroom, with references to teachers as having “power.”

Phase III Findings: Focus group session

The final phase of the study involved one researcher-selected statewide focus group session, conducted in late May, 2000. It was held in a geographic location central to North Carolina, in a bank building providing a neutral environment for participants. The location was within a school district that had responded to the survey but was not selected for either the interview sample or the focus group session. Members were invited to come at their own expense and received a small gift of appreciation. Invited members constituted every layer of the conceptual framework. Members represented different school districts. However, when the session was conducted, there were two layers of the framework missing, a representative from the state department of public instruction and a
representative from the state gifted advocacy group. Members present were an elementary classroom teacher representing the classroom and content expert layers, a middle school principal representing the school context, a coordinator for a school system's gifted program representing the school system context, a parent of three identified gifted children, representing the community and parent context, and a professor, representing the context from higher education. Members of the focus group responded to questions surrounding the implementation of Article 9B from their representative lens. Additionally, the academically gifted coordinator representative on the focus group was also a survey respondent, but not an interview respondent. Following the absence of the state department representative and state advocacy group, follow up phone calls and two separate email attachments with the focus group questions were sent. Neither calls nor email attachments were returned. A third attempt to contact the current or previous state department representative through follow-up phone calls did not yield responses.

**Phase III: Focus group content analysis**

The same eight interview questions used with the telephone interview sample during Phase II were probed with all focus group members via oral commentary and a tape recording. The researcher conducted the focus group session, audiotaped the session, recorded notes during the session and later transcribed the session. The session took approximately three hours. Data analysis was completed using inductive methods of unitizing and categorizing (Lincoln & Guba, 1985). The researcher read the narrative responses and listened to the recorded tape. Following the auditory and visual accounts, the researcher read the transcript again with attention to general impressions. Then the
transcribed responses were organized so that answers to each question were grouped together by the unitized frequency of word counts and the inductive process of emerging patterns and themes. Subsequently, the researcher compared the transcription across interview questions using a process by which “data emerge that fit an existing category” (Glaser & Strauss, 1967). Emerging themes and patterns were clustered under broader categories. The summary section of Phase III considers the categorical representation of emerged themes across interview questions and designated conceptual layers. Appendix F contains the table of aggregated responses by roles.

Phase III: Focus group question 1

Focus group members were asked to what extent they perceived that the implementation of Article 9B (local plans for gifted education) has taken place. Following a review of coding of responses across roles and grouping and regrouping responses to identify patterns and tendencies, one large theme emerged, that of awareness of a new gifted program in the district. Responses referred to areas in which the implementation has resulted in awareness of the increase in teacher training, a larger array of service options, different identification protocols, and increases in communication.

Every member of the focus group mentioned that since the implementation of Article 9B, awareness surrounding gifted students’ needs had increased. Whether the awareness has been played out as new identification protocols, a larger array of services, or system-wide training of teachers, the fact remains that school systems are operationalizing a new gifted program. However, the parent did respond that even though changes have resulted from implementing Article 9B, implementation effort takes second or third place in
comparison to the emphasis placed upon testing. "The only thing giving gifted kids anything is the fact that implementing Article 9B is the law. Otherwise, I am afraid that because teachers do not see the relationship between serving gifted students and preparing students for the EOG's, gifted services would be eliminated."

The teacher responded that in her school system, the implementation has resulted in what is referred to as a differentiated program rather than homogeneous grouping. "Teachers are expected to provide gifted services in their classrooms rather than having an enrichment coordinator pull the students out." The principal said that he perceived the implementation of Article 9B has both positive and negative effects. "Teachers are learning to modify the curriculum to meet the needs of all students in their classroom, which is good. Yet, our school system has lost the director of gifted position in order to hire more teachers and provide more teacher training. I think that can be detrimental because there is a void in the advocacy position of who is overseeing that services occur."

The representative from the higher education perspective felt that what has resulted statewide is local ownership. Prior to Article 9B, principals and school boards would not have considered talking about gifted, and now due to the awareness and mandate on local educational agencies, local school systems have become empowered to make educational changes.

**Phase III: Focus group question 2**

The focus group was asked how they perceived services to gifted learners have changed since the implementation of Article 9B. Secondly, they were asked if they thought that the year the service was implemented had any bearing on the extent to which changes were made in learning environment, program interventions, and content
modifications. The focus group responses surrounding issues of services to gifted learners did not specifically refer to modifications in the areas of learning environment, program interventions, and content modifications. Responses across role types considered overall changes in programming, such as matching students’ needs to services and the changing role of the person providing direct services to students.

Using a gifted specialist as a consultant to support and work with the classroom teacher emerged as a theme. “Because gifted education had to happen everyday in the classroom, we wanted our gifted specialists to work only with the resource AG children and mostly as consultants to teachers. Our services have to be tied to the Standard Course of Study so it made sense that the regular classroom was the place to do it. The concentration now is on tying it to the state curriculum,” shared the principal. The teacher emphasized the responsibility placed on the regular classroom teacher, “We have teachers from all disciplines writing plans on how differentiation will occur in their classroom.”

Matching service to need was another theme across focus group roles. The emphasis on services that were in light of students’ needs rather than one program for all gifted students was noted. The second component to the change in services was the awareness of service options communicated to multiple stakeholder groups. “Our new plan is embraced by more people because the focus is on the service, not the label. We are looking at differentiating instruction, not which kids get pulled out on Thursdays,” responded the principal. The coordinator similarly responded, “We look at matching of need to service, and then we had to make sure that it was communicated and articulated.” The parent said, “Years ago in our county, there was one model and so that was what the
students had. Now, there is an array of service options for kids. I think that’s a better way to look at students.”

In terms of the impact of whether the year for implementing services had any bearing on the change in services provided, responses were mixed. Some chose to implement any changes the first year, while others chose to phase in service options over a few years. Yet, in all cases, respondents felt that the year of implementation (i.e., whether the new gifted plan was implemented in one year or phased in over a series of years), did not have any bearing on the extent to which service options for gifted learners were changed.

Phase III: Focus group question 3

Focus group members responded to a question concerning the identification of three changes to their local program affected by the implementation of a local plan for gifted. Awareness by multiple stakeholder groups, extensive teacher training, and shifting programmatic changes resulting in shifting personnel roles were the recurrent themes among all contextual layers. The principal responded, “I have seen an awareness of different options available throughout the district, so one result is that people have a much greater understanding that there are other things that can be done in a resource room or in a classroom, or that AP in the high school doesn’t necessarily mean gifted services.” The higher education representative elaborated on the awareness issue and discriminated between awareness and services: “I think across the state we have done a phenomenal job with the awareness level. I have seen a real change in the understanding of gifted needs. I think that although the frustration level has increased due in part to the
awareness of meeting gifted students' needs, the ability to do anything meaningful around it has not followed suit, in part due to testing."

Teacher training was another theme. "Teachers have been really encouraged to take advantage of the staff development opportunities and the school system has made it possible for the training to be within their reach. What I see now, which is encouraging, is that the language of serving students is changing," shared the coordinator. The principal concurred, "At my school because we wanted a variety of students for all of our teachers, we have really had to make staff development a priority. What I am seeing now, is that my classroom teachers feel more comfortable identifying students whereas before I always wondered why some kids were performing well, but no one referred them to the AIG specialist." The higher education focus group member shared, "Personnel preparation is a major change in local ownership at all levels, but within that I think we have seen a conceptual change of gifted education into the fabric of general education and all of these things are manifestations of that."

Programmatic changes resulting in shifting personnel roles was described by the teacher, "Where I see it really working is when we have grade level meetings and the AIG specialist attends those meetings. We all put our heads together as far as what we are going to teach and then she helps us discuss what can be done for advanced learners and I think that is very good." The coordinator mentioned, "Their role has changed dramatically. They used to just test, identify and meet with students but now they almost wear an administrator's hat because they are working with so many teachers and different grade levels of students."
Phase III: Focus group question 4

The focus group responded to the question of supporting factors for the implementation of a local plan for gifted education. Focus group predominant themes were similar to those provided by Phase I and II respondents, such as school level administrative support and district level administration as supporting structures. A sub-theme under district level administrative support was the change in state law, Article 9B, requiring someone in the district to be responsible for overseeing implementation efforts. “The law requires that there must be someone in charge and it should be reiterated in the guidelines adopted in local plans,” shared the higher education representative. “A principal can do it by himself, if he believes in it, but if you want all principals involved, then you have to get the superintendent support and direction,” was the principal response to site-based or school level administrative support, but it is important to have district level support. District level support was expressed in different ways, such as the coordinator’s comment, “One thing that has to be there as a support, is someone from the district that is in charge. If it is not the superintendent, then maybe his designee. It may not be his baby, but at least he’s endorsed it.” Responses to the question of support structures varied somewhat according to role. For example, the coordinator noted that prior to the implementation of Article 9B, there were only 11 coordinators for gifted programs in the state, and one of the components of Article 9B is that a point person must be responsible for overseeing the accountability of implementation. Hence, since 1996 there are 117 persons statewide in the advocacy and accountability role for Article 9B. Another role variation was made by the higher education representative who considered the testing program be reconsidered as a supporting factor, “I think if we reframed the
way we think about the End-of-Grade testing, it could be a supporting factor. If students could make a year’s worth of growth for a year’s worth of school, this would show where students start and could be a point of departure for differentiation.”

Phase III: Focus group question 5

Concerns over the statewide testing program were prevalent as an impeding factor among focus group members. The teacher responded, “When the pressure is on you to make sure that everyone gets a certain score on the test, it just takes over your classroom.” Other themes that emerged were lack of funding and teacher and administrator reluctance to change. One difference that emerged as an impeding factor was parental concern for a gifted label. The parent shared, “One thing that I think hurts our program is the few parents that have to wear the gifted label on their sleeves. They don’t understand that all they are seeing is the elitist part and not what services the kids are getting. One time I was getting out of my car, and the first question another parent asked me was what my kids got on their SAT.”

Funding was mentioned in the context of restrictions on hiring new teachers, limited resources as in curriculum packages, and inability to offer staff development. One focus group member mentioned that when the state mandated Article 9B to be implemented in North Carolina, the state formula for funding gifted programs at the local level did not change, although the state was requiring local school systems to provide a broader array of identification protocol, increased services, and teacher training.

Phase III: Focus group question 6

Question 6 asked focus group members which state reform efforts have most powerfully impacted their local program. Responses across roles included the ABC’s and
the state EOG/EOC testing program. One interesting response came from the coordinator and parent, both responding that rather than any state reform effort impacting their respective programs, the greatest impact has come from natural disasters. Both members live in geographic areas in North Carolina that over the past several years have incurred a number of natural disasters. According to the coordinator, "One of things that has had an enormous impact was the expense of Hurricane Floyd. Across our area in the state, I saw things that got terribly cut. We had across-the-board budget cuts to every department."

Much of the discussion, however, concerning state reform impacts focused on the ABC’s and the testing program, EOGs and EOCs, with repeated themes of teacher pressure, focused attention on lower-end learners and fear of local or state reprimand.

**Phase III: Focus group question 7**

Question 7 asked focus group members to describe any areas in their gifted program that need additional attention for the program to be optimal. There were some variations in theme depending upon the lens of the focus group member. One theme that cut across the roles of teacher, principal, coordinator, and parent was increasing and diversifying program options by proactive attempts to have typically underrepresented groups embedded within the larger program options. For example, the coordinator mentioned increasing services to include a K-2 component and a focus on social-emotional needs of gifted students. The teacher responded that her system needed to do a better job at identifying gifted minority students. The other theme that emerged was advocacy. It was initiated by the higher education representative, but following the individual’s comments, other focus group members concurred and broadened their
comments to reflect advocacy issues. "We need continued advocacy at the state level for additional funding and continued advocacy at the national level for legislation and allocations for gifted education. There is a huge difference between a law and an allocation. The committee can reduce or eliminate any funding amounts, but having the law there is important," shared the higher education focus group member. Following that comment, the other members shared their perspectives with regard to advocacy efforts within their school districts.

**Phase III: Focus group question 8**

Focus group members were asked which educational context had the greatest impact on gifted learners. The focus group responded to the question in varying ways. The classroom was the predominant theme, and yet, the principal and parent shared that the educational context which had the greatest impact was the partnership between home and teacher. The teacher responded that the largest impact came from the curriculum, and the higher education representative indicated the classroom. Focus group members were quick to illustrate relationships between and among contexts. "They all interact together. Gifted education will not have an impact unless they all work together," responded the higher education representative.

**Phase III: Summary of Findings**

Phase III considered broader themes that emerged from focus group discussions across questions and member representation. Broader themes were accountability, educational change, and advocacy.
Accountability

Focus group members (N=5) repeatedly addressed accountability issues, whether in referring to state or local efforts. Discussions centering on North Carolina’s state testing program or the ABC’s indicated some frustration over the state’s expectations for local performance. Members felt that local initiatives, such as implementing Article 9B, took the back seat to state testing. Other local accountability concerns included references to shifting the burden of responsibility for providing services to gifted learners to classroom teachers, local ownership and decision making with regard to program modifications, district and school level support as accountability measures, and formalizing a system for gifted education, including designating someone ultimately responsible for overseeing the districts’ implementation efforts.

Educational change

Responses across focus group member roles (N=5) and interview questions relating to educational change included references to increased awareness levels by multiple stakeholder groups of gifted learners implementing the local plan, or employment of differentiation strategies. Employing educational changes due to implementing a local plan for gifted had resulted in increased awareness about gifted students. One member summed it up, “I remember when you could not get a superintendent to talk to you about gifted, now, conversations are happening. They are happening at the school level, at the district level, and at the state level.” Other educational change issues related to the literal change in state law, changes in the funding mechanism and allocation, programming, or context in which gifted students are served. Funding was of primary concern by members due mostly to the additional fiscal
responsibility placed upon local school districts to finance programmatic changes. Two members viewed natural disasters as the impetus behind their local budget cuts. They lived in a geographically area in North Carolina that over a series of years had been hit by several natural disasters. As a result of the natural disasters, the two school districts were forced to cut all budget areas in order to divert monies to immediate needs of shelter and safety.

Staff development was viewed as a catalyst for implementing perceived educational changes. Much of the focus revolved around the changes that classroom teachers, with or without staff development, were expected to do, and the pressures teachers felt to differentiate while adhering to the state’s curriculum framework. Some respondents mentioned that although services may not have changed, Article 9B operationalized and legitimized existing practices. However, other members expressed that educational change resulted in the shift of the gifted program as an integral part of the overall school district’s program.

Advocacy

Members (N=5) specifically mentioned or implied advocacy efforts at the local, state, and national levels. Local advocacy efforts included increased awareness levels around implementation of their local plan and identification practices. Local advocacy included parent, teacher, and administrative involvement at multiple stages of implementation. State advocacy references included technical assistance and support from other school systems as well as institutions of higher education. Article 9B was viewed as a statewide advocacy effort with deference to local control. Federal references included legislation and funding.
Summary of Findings

The research findings for the three phases of this study are grouped into four summaries, by research question.

1) All eight subcomponents of Article 9B have been implemented to varying degrees by every survey respondent (N=71), telephone interview respondent (N=11) and focus group member (N=5).

2) For 84% (N=60) of survey respondents, some change had taken place in the way gifted students were served in their school system since the implementation of Article 9B. For another 12% (N=9), complete change had taken place in the way gifted students are served.

3) Every survey respondent indicated either significant impact, 28% (N=20), or some impact, 72% (N=51) on the overall school system based upon the implementation of the new local gifted plan.

4) The year of implementing Article 9B does not have a statistically significant relationship to the impact of implementation, nor does it have any bearing on the degree to which implementation efforts occurred based on all data sources.

5) Telephone interviews and focus group respondents indicated significant increased awareness levels among multiple stakeholder groups related to gifted education surrounding Article 9B.

6) Telephone interviews and focus group respondents felt that their gifted program was compromised and overshadowed by the pressure teachers felt to cover the mandated state curriculum and prepare students for the end of the year state testing program.
Findings related to Research Question 2:

1) The prevalent learning environment used to serve gifted learners for grades K-3 was the regular heterogeneous classroom (70%).

2) The prevalent learning environment used to serve gifted learners for grades 4-5, was the regular classroom with a consultant to support the classroom teacher (58%).

3) The prevalent learning environment used to serve gifted learners for grades 6-12 was ability grouping for specific subject areas (6-8, 79%; 9-12, 45%).

4) At all grade levels, K-12, the prevalent content modification used to serve gifted learners was individual assignments or projects (K-3, 66%; 4-5, 69%; 6-8, 63%; 9-12 49%).

5) The most frequently reported program intervention used to serve gifted learners in grades K-8, was grade advancement or early admission (K-3, 41%; 4-5, 35%; 6-8, 31%).

6) At the high school level (grades 9-12), the most frequently reported program intervention (96%) used to serve gifted learners was AP (Advanced Placement) courses.

7) Survey respondents, telephone interviews, and focus group respondents reported that the year of implementing Article 9B does not have bearing on the extent to which services were employed.

Findings related to Research Question 3:

1) For survey respondents, the four areas most frequently reported as support structures for implementing Article 9B, in descending order, were: district level
administrative support (96%), school level administrative support (89%), having a differentiated curriculum (79%), and strong staff development (69%).

2) There was no statistically significant difference between district types and supporting structures.

3) There was no statistically significant difference between supporting structures of district level administration and staff development related to the year of implementation.

4) The structures of school level administration and differentiated curriculum were independent of the year of implementation.

5) The broad themes of educational change and accountability emerged from telephone and focus group respondents. Both themes were perceived to be both supporting and impeding structures for implementing a local plan for gifted education.

6) The category of advocacy emerged as a broad theme from the focus group, while the category of authority emerged as a broad theme from telephone interview respondents.

7) Telephone and focus group respondent themes for supporting structures included school level administration, district level administration, having an advocate in every school system, strong staff development, and parental support.

8) For survey respondents, the four most frequently reported impeding structures in descending order were: lack of teachers’ capacity to change (73%), lack of a differentiated curriculum (51%), limited staff development (41%), and school level administration (32%).
9) There was not a statistically significant relationship between the most frequently reported impeding structures and district type or year of implementation.

10) Telephone and focus group respondent themes for impeding structures included: state emphasis on testing, lack of funding, and teachers’ reluctance to change.

Findings related to Research Question 4:

1) What occurs in the specific classroom between the teacher and student was selected as the educational context perceived as impacting the gifted learner to the greatest degree by all survey, telephone, and focus group respondents.

2) According to survey and telephone respondents, the three most frequently reported powerful forces affecting the delivery of gifted services in North Carolina were: the change in legislation (Article 9B), the state’s accountability initiative (ABC’s), and the state’s testing program (EOG/EOC).

3) Focus group respondents cited the state’s accountability initiative (ABC’s), the state’s testing program (EOGs/EOCs), and technology as the most powerful forces affecting the delivery of gifted services in North Carolina.

4) Survey respondents perceived that change occurred in their school system either top down (31%) or as a mix of top down/bottom up (66%). No respondents answered that change occurs as a bottom up effort.

5) For survey respondents who answered that changes occur in their school system as a mix of top down and bottom up (66%), they also perceived a greater degree of program integration between the gifted program and the overall school system (82%), than those respondents who answered that educational changes occur top down (14%).
6) Survey respondents chose professional development (59%), increased numbers of teachers endorsed in gifted education (45%) and representation of culturally diverse students in the gifted program (32%) as local areas most impacted by state reform efforts.

7) Telephone and focus group respondents emphasized the changing role for the gifted specialist as an area that has changed in their local program based upon the implementation of Article 9B. The role was characterized as moving away from direct services to gifted learners and towards supporting the classroom teacher as a resource or consultant.

8) Focus group respondents cited the following areas as needing improvement for their local programs to be optimal: K-2 education, affective education, increasing services to dual exceptionality gifted, the ability to measure growth for gifted students, and having a clearly articulated differentiated curriculum, while telephone respondents mentioned increased funding.

9) Survey respondents cited the areas of funding (68%) and adoption of a differentiated curriculum 52%) as the predominant areas in need of improvement for their local programs to be optimal.

10) Survey respondents perceived that state reform efforts neither detracted nor assisted in implementing a local plan for gifted education (43%).

The next chapter discusses these findings in further detail, draws some conclusions regarding them, and suggests implications of the study for further research and practice.
Chapter 5
Discussion, Conclusions, and Implications

Introduction

The purpose of this study was to determine the impact of North Carolina’s gifted reform policy (Article 9B) on local school districts’ programming for gifted students and the extent to which educational changes made in local gifted programs relate to other state-initiated systemic reform efforts. This study employed three phases of research. Phase I was a statewide survey sent to the total population of individuals primarily responsible for overseeing the school district’s implementation of Article 9B. Phase II involved conducting telephone interviews through a stratified random sample by district type with 15% of survey respondents. Phase III was a researcher-selected focus group session conducted with participants representing educational contexts of the conceptual framework (Talbert & McLaughlin, 1993) used in this study. The discussion section of this chapter, organized by literature strands as outlined in Chapter 2, focuses on the relationship of research question findings to the existing literature and specific findings of interest. The conclusion section synthesizes the findings across the research questions. Implications for further research, policy development, and practice in terms of program development for the gifted conclude this chapter.
Discussion

Policy Implementation

Across research questions, several interesting findings emerged related to the literature on policy implementation. The implementation of Article 9B legitimized existing gifted program services in two ways. First, for many school districts, it formalized a program that had tacitly been in place. In all research phases, respondents shared that services to gifted students had always been in place, K-12, yet there was a need to formalize a system for service delivery or to shore up services between schools and grade levels. Article 9B became the conduit through which services that had been in place and perceived as strengths, such as AP courses offered at the high school, could be formalized and articulated throughout the school district, thus opening the door for new services to be included. This finding is consistent with McDonnell and Elmore’s research on policy implementation. McDonnell & Elmore (1987) suggested that when local school districts’ own policy goals “made sense” to educators, districts used state policies as springboards for local solutions and program formalization.

A second effect of Article 9B was that gifted services became viewed as a district-wide program rather than an individual’s instructional strategy. With the legitimacy of a state mandate to amplify a structure supporting services to gifted learners, school districts throughout North Carolina began to consider changes in learning environments, program interventions, and content modifications for gifted students as part of K-12 educational programming. This finding was consistent with the Rand (1978) studies, which concluded that a systems perspective was one of the necessary components for policies to be effectively implemented.
The implementation of Article 9B also appeared to relate to increased awareness levels from multiple stakeholders. All respondents from every phase of the research study suggested that discussions around educating gifted students had increased. Fuhrman and Elmore (1990) found in their research study of six states that local activism in reform takes a variety of forms, such as teachers serving on local curriculum committees, or local districts using state policies as a catalyst for achieving district objectives. Findings from this study suggested that local activism for implementing Article 9B was manifested through discussions among and between the contextual layers in the conceptual framework. Examples of increased awareness from this study were consistent with Fuhrman and Elmore’s (1990) research. Despite the emphasis on increased awareness, however, findings did not demonstrate much evidence of a coordinated, deliberate effort at reform, and commentary from participants indicated that this perhaps was due to changes in local personnel between the planning and implementation stages and selective participant involvement at all stages of implementation. Therefore, inferences surrounding operationalizing a coordinated and supportive implementation effort between multiple stakeholders as a result of increased awareness cannot be made.

The results of this study indicated that supporting factors for implementation of a local plan for gifted included school level administration, district level administration, differentiated curriculum, and professional development. The most frequently reported impeding structures included: lack of teachers' capacity to change, lack of a differentiated curriculum, limited staff development, and school level administration. Apparent in the provided responses is the overlap of structures appearing as both supporting and impeding, such as school level administration. Ethnographic research
conducted on systemic science reform in California by Atkins, Helms, Rosiek and Singer (1996) considered policy implementation efforts in which tensions between teachers and administration thwarted integration of science curriculum. Their results showed that complexities exist between teacher empowerment and centralized mandates. In this study, school level administration was perceived as either supporting or impeding based upon this study’s responding districts. This finding supports the trend in school reform to allow for site-based decision making and showcases that policy implementation efforts are contextually-bound; thus findings from this study were consistent with the Atkins et al. study.

According to Fullan (1993), educational changes require new skills, behavior, and beliefs or understanding. Additionally, Fullan (1993) and Stacey (1992) stated that change is a dynamic process, and as such, is non-linear. It is possible that this study’s findings showing conflicting supporting and impeding structures are manifestations of the non-linear nature of change as well as the lack of necessary required new skills, behavior, and beliefs by those responsible for implementation. Conceptually, supporting and impeding structures found in this study were viewed by respondents as separate and distinct contextual conditions, rather than as a connected conduit for sustaining implementation efforts.

Another finding related to policy implementation was that for close to half of reporting school districts (43.7%), state-initiated reform efforts neither assisted nor detracted from the implementation of their local plan for gifted education. This finding is consistent with the body of literature which suggests that local manifestations of state policy will differ fundamentally based upon the local context (Mazzoni, 1993;
McLaughlin, 1987; Moore, Goertz, & Hartle, 1991). Mazzoni’s (1993) findings showed that the policy process from state-initiated reform efforts to local implementation cannot be perceived as a rational model but must take into account the complexity and synthesis of the change process. The current study captures some of the elements from Mazzoni’s (1993) work associated with the complexity of the change process of policy to practice and from state to local control. Additionally, the current study suggested that in many school districts, state policy efforts are perceived as disconnected from local implementation efforts.

Finally, respondents across all phases of the research study indicated that the areas most affected by state-initiated school reform efforts included the change in state law (Article 9B), professional development, and changing personnel roles. Respondents also indicated that state funding was not invested with the change in state law (Article 9B), and fiscal responsibility for implementation of the local gifted plan fell to local districts. Local funding determined the degree to which cited areas most affected by state-initiated school reform efforts had been implemented district-wide. Cuban (1990) concluded that when changes in economic stability or shifts in population occur, social change uncovers tensions, which give rise to individuals or groups championing particular values. This study’s finding that funding impacts the degree to which areas in the local plan are affected and implemented is consistent with Cuban’s research. For example, in a large geographic region in North Carolina, there have been numerous natural disasters over the last few years. As a result, local funding from every program shifted to more immediate concerns of safety, shelter, and potable water sources. Due to
the shift in economic stability, groups rallied around survival issues, and programmatic changes that had been taking place in the gifted program lay dormant.

**Educational Change**

The implementation of every subcomponent of Article 9B represented a change in local programs for all respondents. The degree to which subcomponents have been implemented varied in multiple ways. For some school districts, Article 9B formalized a system that had tacitly been in place. For others, it created many changes such as new hires, changing services, changing identification practices, or involving multiple stakeholder groups throughout the planning and implementing stages of the process. Those school districts that responded that district-wide programmatic changes had taken place in multiple ways support the literature on key factors associated with effective educational change (Crandall et. al., 1982; Crandall, Eiseman & Louis, 1986; Fullan, 1985; Huberman & Miles, 1984; Livingston & Borko, 1989; McLaughlin, 1993; Odden & March, 1989). The key aspects of ambitious efforts, micro-implementation, top-down initiation with teacher involvement, central office support, teacher participation, extensive on-going training, and commitment by multiple stakeholders were found in the North Carolina districts. Additionally, by incorporating key aspects of effective educational change, North Carolina school districts are consistent with the conceptual framework, because educational contexts are not mutually exclusive. However, an interesting finding from those school districts whose programmatic implementation efforts supported the key factors of educational change was that with regard to the process and length of time in which changes were made, findings were inconsistent with the literature by Crofton (1981). According to Crofton (1981), meaningful changes occur
as a process, not an event, and require a minimum of two years for the conditions of change to sustain. Yet, several study respondents reported that changes made were not necessarily incremental, nor had been in place for a lengthy period of time. Implementing Article 9B in a relatively short amount of time was perhaps in response to the event of the state mandate, rather than as a naturally occurring process, and more time is needed to see if educational changes made become systemically meaningful.

Across research questions, the finding that teachers lack the capacity to change emerged as an impeding structure for the implementation of Article 9B. This finding, while highlighting an important issue, may be due to the perspective of the respondents, mainly gifted program coordinators and other stakeholders who are not currently teaching, rather than amplifying teachers' lack of capacity to change. Within the context of educational change studies, teachers must be flexible, develop pedagogical strategies that challenge all learners, and be able to meet individual learning needs of students in order to provide equal access to the core curriculum (Fuhrman & Elmore, 1990). This implies that teachers must be fundamentally willing to change in order for school reform efforts to be successful. According to work by Fullan (1993), on educational change, when teachers work on personal vision-building and witness how their commitment to making a difference in the classroom is connected to the wider purpose of education, it gives practical and moral meaning to their profession. The challenges of meeting state demands for testing and diverse student needs signifies a school setting that most teachers cannot respond to effectively (Fuhrman, 1993). Although some findings in this study indicated the willingness by teachers to change, until teachers' capacity to change is fully realized, complete implementation of Article 9B will not occur.
Interesting results were found in this study regarding the direction of educational change. Educational change for local school districts occurred either as a result of top-down efforts or as a mix of bottom-up and top-down efforts and that the integration of the gifted program within the larger school district is greater where change is perceived to have occurred as a mix of top-down and bottom-up. When respondents were probed during Phases II and III to clarify and explain top-down efforts, responses were relevant to the local context of district level authority, such as the superintendent or school board, or school level authority, such as the school principal, rather than state top-down authority. The finding of stronger gifted program integration where changes occurred as a mix of top-down and bottom-up is consistent with Fullan’s (1994) research that change occurs when top-down mandates and bottom-up initiatives connect. He found that when mandates connect with the aspirations and capabilities of local schools, significant change may ensue. In this study, having district level administration as a supporting top-down structure coupled with teacher involvement as a bottom-up effort was consistent with Fullan’s research. Huberman and Miles (1984) showed that top-down initiated efforts not only worked, but were more successful in more instances than bottom-up initiated change efforts. While research documents that top-down efforts are effective in promoting educational changes, systemic reform studies point to the centrality of teacher participation, commitment, and input in order for change efforts to reach advanced stages (Berman & McLaughlin 1978; Fullan, 1985; Livingston & Borko, 1989; Odden, 1991; Purkey & Smith, 1985; and Rand, 1978). This study supports the research on top-down mandated change and bottom-up teacher involvement.
The themes provided by the telephone interviewees and focus group members typically amplified survey findings on implementing educational change, yet one theme differed between the telephone interview group and focus group members. The broader theme of authority emerged from the telephone interview group while the theme of advocacy emerged from the provided responses by focus group members. Accounting for this difference in themes may be the difference in the respective member roles. For example, many of the telephone interviewees were once teachers so that the bias in their responses was toward the teacher perspective and authority was perceived to be a predominant theme. Focus group members, on the other hand, although acknowledging authority as an ingredient for educational change, focused on issues of advocacy for supporting change. Focus group members represented individuals outside of the educational field (e.g. parents) whose perspective is not limited to just what occurs in the classroom.

Systemic Reform

In regard to findings across research questions to the literature on systemic reform, professional development was an area in local programs that had been greatly impacted as a result of Article 9B. Professional development targeted for regular classroom teachers to receive training and, in many cases, additional licensure, was the conduit through which many changes were made. This finding is consistent with the literature by Fullan (1985), and Purkey and Smith, (1985) which stated that implementation of change only works if ongoing assistance is provided to teachers in classrooms and schools. This finding also supports the literature from large-scale systemic reform initiatives (Knapp, 1997). Knapp suggested that although there are
attempts by teachers to incorporate aspects of reform into classroom practice, there is little evidence to suggest that teachers fully grasp or internalize a reform vision. This also was found in the current study in which teachers received multiple staff development sessions, yet respondents were uncertain to what degree teachers were internalizing the staff development offerings and effectively employing them in ways that were meaningful to gifted students. Knapp (1997) also found that systemic strategies were more effective at the individual level than at the organizational level. The current research study supports evidence of learning at the individual level. An interesting finding was that professional development was the most frequently reported local area in the gifted program affected by state reform efforts, and yet, it was perceived as only a moderate supporting factor for implementing a local gifted plan. This finding may suggest that although teachers received many professional development sessions, respondents perceived that teachers did not see the relationship between the content of the sessions and implementing a new local plan for gifted education or providing specific services to gifted students.

Additionally, according to Talbert and McLaughlin’s (1993) conceptual framework, contextual conditions are highly interactive. Each educational context is embedded within another layer and fluidity occurs between layers; thus layers are not static. Therefore, professional development sessions should attend to multiple layers, as represented by different educational contexts, such as relationships between content and school district initiatives or the implications of state educational goals on classroom instruction, rather than specifically targeting only what occurs in the classroom. Based upon Phase I findings, the foci of professional development sessions were the classroom
context. If the intent of professional development is ultimately to reshape teachers’ practices, then professional development sessions should attend to the impact and relationship among educational contexts. Fullan’s (1993) research on change supports the conclusion that school districts must consider multiple contexts which impact educational change. Teachers must continue to focus on making a difference with individual students, but realize that they are part of a larger learning society.

**Gifted Programs**

One change that has taken place for the majority of local school districts’ gifted programs has been an emphasis in gifted services provided by the regular classroom teacher rather than an alternative model, such as pull-out. Students were heterogeneously grouped in grades K-5 and within the heterogeneous classroom received little differentiated curriculum. In the reporting districts, for grades 6-12, students were ability-grouped. Research on differentiated settings showed that general classrooms are probably the least differentiated approach to educating gifted learners (Westberg, Archambault, Dobyns, & Salvin, 1993). Additional studies on ability grouping indicated that gifted students do not necessarily benefit solely based upon grouping. Gifted students do, however, benefit from ability grouping if the curriculum is accelerated and enriched (Gallagher & Gallagher, 1994; Kulik & Kulik, 1991; Slavin, 1988, 1990; Van Tassel-Baska, 1992; Westberg, et. al. 1993). Current programming practices for grades K-5 in local school districts in North Carolina appear to be inconsistent with the findings on ability grouping as well as the findings on providing an accelerated and enriched curriculum in ability-grouped classrooms.
Services to gifted students have been impacted by Article 9B throughout K-12 in terms of learning environment, program interventions, and content modifications. The year of implementing Article 9B does not seem to impact the extent to which gifted services were provided. One finding across all phases of the study was the concerted effort of matching services in learning environment, program interventions, and content modifications to students’ needs, indicating a more flexible approach to program planning. In a review of literature on systemic reform, Conley and Goldman (1998) found that schools which focused on improving instruction demonstrated changes in attitude, practice, and student achievement, even though achievements were uneven. The move toward programs organized around the needs of the students is consonant with teachers’ interpretation of reform principles, and is consistent with the literature on school reform, yet falls short with general findings on program development for the gifted (Avery & Van Tassel-Baska, 1995; Borland, 1989; Cox, Daniel & Boston, 1985; Hunsaker & Callahan, 1993). Program development and articulation for the gifted carries with it certain assumptions for teachers who work with gifted students. For example, a teacher must understand a given domain of knowledge and be able to develop advanced-level work to effectively challenge gifted learners. Employed strategies must be incorporated into the larger delivery of a well-articulated, comprehensive program (Van Tassel-Baska, 1998). Additionally, programming for the gifted should offer options that reach through and beyond the normal curricula, across disciplines, across grade levels, and across levels of intelligence (Cox, Daniel, & Boston, 1985). While reported efforts for implementing services were a direct attempt at modifying content or changing
learning environments to meet individual needs, the larger dynamic program elements necessary for systemic comprehensive gifted program development were not found.

Another finding was the use of individual assignments or projects as the most frequently reported content modification for gifted students in grades K-12 in the regular classroom environment. National reports (USDOE, 1993) have documented that a majority of gifted learners spend a substantial part of their school day in unchallenging academic endeavors. Additionally, a considerable part of the literature on curricular planning and instructional design for the gifted addresses the matter of how to raise the intellectual level of content, not how to personalize it (Passow, 1989; Shore, Cornell, Robinson, & Ward, 1991; Tannenbaum, 1983; USDOE, 1993; Van Tassel-Baska, 1996, 1998). A question remains from the current study whether the nature of the individual assignments were personalized or appropriately content-adjusted for gifted students.

The caveat for all findings was Article 9B as a state mandated policy. In a gifted program status study across nineteen states, Purcell (1995) determined that one of the causes for retention of local gifted programs was attributed to states with mandates for gifted programming. According to Purcell, patterns in responses revealed that states with mandates attributed the stability and expansion of local programs to the existence of a state mandate. Coleman and Gallagher (1992) found that most states did not mandate programming for gifted students but mandated other aspects such as identification or funding. This study’s finding was consistent with Purcell’s finding on program mandates and may provide an impetus for states which currently do not provide a state-initiated mandate to do so.
The results indicated that North Carolina's reform initiative, ABC's, and its testing components, EOG's and EOC's, have impacted the way gifted services are locally delivered. All respondents from each study phase indicated concerns over the pressure teachers felt to adhere to the state's mandated curriculum and testing protocol. This study found that the primary mode of service delivery for grades K-5 was the heterogeneous classroom, with a gifted specialist used collaboratively as a resource. The primary mode of service delivery for grades 6-12 was ability grouping by subject area. Having services for gifted students provided in the regular heterogeneous classroom for grades 3-5 was a service which had been in place for less than three years as reported by most respondents and resulted from the importance district level and school level administrators placed upon the ABC's and state testing. Koshy and Casey (1998) found that British teachers recognized the contribution of a national curriculum but did not feel that the national curriculum was an effective framework for higher ability students. Similarly, the perceptions by gifted program coordinators was that teachers felt confined to follow the prescribed state curriculum, even if it meant going over material already mastered by gifted students or slowing down the pace of instruction to ensure that all students mastered the concepts. Respondents reported that teachers could no longer do creative activities and felt compelled to stick to the core curriculum. Although professional development was reported as a supporting structure, a powerful local change from all school districts, and the conduit through which the implementation of Article 9B had taken place, this study suggests that classroom teachers do not see the need to differentiate services to gifted students in light of preparing all students for the End-of-Grade or End-of-Course tests.
Research on curricular impacts on gifted learners (Van Tassel-Baska, Johnson, Hughes, & Boyce, 1996; Van Tassel-Baska, Bass, Ries, Poland & Avery, 1998; Van Tassel-Baska, Zuo, Avery & Little, in press) indicated significant growth gains when higher level thinking and concept development are embedded in content standards at the classroom level. In the current study, individual assignments or projects were the most frequently reported content modifications in grades K-12. Additionally, a differentiated curriculum was one of the most frequently reported supporting structures and lack of a differentiated curriculum one of the most frequently reported impeding structures for implementing Article 9B. These respective findings are consistent with the research on the need for and impact of curriculum modifications. Yet, the nature of the individual assignments or what teachers and coordinators define as a differentiated curriculum was not sufficiently revealed through this study. Thus, the extent to which and in what ways differentiated curriculum served as a support structure is unclear from the study findings.

Regarding the relationship between the educational context that most impacted the gifted learner and those areas most affected by state-initiated school reform efforts, the majority of respondents from each research phase indicated that the classroom context had the greatest impact on gifted learners. This finding is consistent with policy implementation studies by Cohen and Ball (1990), whose case studies highlighted mathematics reform initiatives enacted at the classroom level. This finding is also consistent with educational change studies by Crofton (1981) who determined that involvement of teachers is a necessary condition for change and that individual teachers adapt change in their classroom. The classroom context has also emerged as critical in the curricular studies by Van Tassel-Baska et. al. (1996, 1998), which assessed specific
methodological and assessment approaches that teachers employed in the classroom, again acknowledging the centrality of changing practice at the classroom level in order to impact student achievement. However, this finding is inconsistent with policy implementation studies by Cuban (1990), Fuhrman, Clune, and Elmore (1988), and systemic reform studies by Smith and O’Day (1991), Tyack and Cuban (1995) and Conley and Goldman (1998), which found that institutional, environmental, and large-scale reform initiatives had greater impact on educational change than the classroom.

Conclusions

There has been a conceptual shift in gifted education in North Carolina into the fabric of general education and away from special education. This study’s findings were manifestations of that conceptual change. The conceptual change has been spearheaded by Article 9B and operationalized at the school district level through changing services to gifted students, providing for professional development, increased awareness of gifted needs from multiple stakeholder groups, changing personnel roles defining responsibility for meeting the needs of gifted learners, and allowing for local ownership and authority for implementation efforts. While implementation of Article 9B has occurred in varying ways by all respondents, a source of disagreement arose on the issue of the level of analysis at which implementation efforts occurred. For example, findings showed that programmatic changes made in terms of learning environment, program interventions, and content modifications occurred at the school district level, yet, the level of analysis in which differentiation occurred and was held accountable was at the classroom level, not at the program level. Further, supporting structures for implementation were found at the school and school district administrative levels, not at the classroom level. Perhaps
implementing Article 9B is best understood in the context of both appropriateness to a gifted student as well as the total population of gifted students within a school district.

Secondly, North Carolina's school reform initiative for accountability, ABC's, has impacted the implementation of North Carolina's school reform initiative for gifted education, Article 9B, and due to the emphasis on testing from the ABC's, the ability to do anything meaningful and sustainable with gifted students by implementing Article 9B has not followed suit. "Changing formal structures is not the same as changing norms, habits, skills and beliefs," (Fullan, 1993, p. 49). Additionally, many school districts felt that they did not have adequate resources to reasonably and appropriately implement a new plan for gifted education. The lack of a coherent, sustained, coordinated effort between state school reform initiatives has precluded an effective change process being implemented at the local level. Conflicting messages from policy sources have diluted the impact of the gifted reform policy's intent on classroom instruction.

Implications

Research implications

Based upon this study, several research implications exist. There is a need for research to determine the extent and impact of individualizing assignments and/or projects for various types of gifted students in different learning environments, since this finding was the predominant mode of content modifications for gifted students K-12. Research on individualizing assignments should focus on whether or not the content is modified (i.e., accelerated) or if the assignment is an attempt to meet the learning preference or style of the student, under which conditions and for which types of learners, grade levels, and settings.
Secondly, there is a need for an analysis on gifted program funding at the state level in order to understand how funding impacts the education of gifted learners. Due to the change in state law (Article 9B) mandating implementation of local gifted programs, local school districts complied with the state mandate but at their own fiscal expense. School districts in North Carolina implemented Article 9B without additional state funding. Had monies been available as part of the legislation, in what ways would implementation efforts have been different? How much does it cost to educate a gifted child appropriately? Where does money have the greatest impact on educating gifted learners?

Thirdly, there is a need to conduct research on the effects of professional development in gifted education on meeting the curricular and programming needs of the gifted in various learning environments. Respondents perceived professional development as the most impacted area by state reform efforts. Additionally, it was listed as one of the strongest supporting structures for implementing a new gifted plan, yet respondents from Phases II and III raised concerns as to the relationship between professional development sessions and teachers’ ability to implement Article 9B. Moreover, findings showed a disconnect between professional development sessions and teachers’ understanding of how the professional development sessions related to state standards and testing.

Finally, there is a need to conduct a follow-up study five years from now to consider the sustainability of implementation of Article 9B. What would Article 9B look like in terms of institutionalizing educational change? According to the research on systemic reform, implementation requires a considerable length of time in order to become part of
the institutional landscape within a school district (Smith & O'Day, 1991). For the majority of the responding school districts, Article 9B has been in place for two years. Allowing for a longer length of time for educational changes to occur over time would enable a researcher to consider which changes would be sustained over time and which would not. Additionally, to what extent has the implementation of Article 9B impacted gifted students’ learning?

**Policy implications**

In order to meet the needs of gifted learners, policy makers should refocus the core skill areas in the North Carolina Standard Course of Study and its testing accompaniment at maximum competency levels. Findings from this study showed that the predominant mode of service delivery to gifted learners was the regular classroom, and that the classroom context was the area perceived to have the greatest impact on educational change with gifted learners. Additionally, lack of a differentiated curriculum was found to be an impeding structure in the process of implementing Article 9B. Therefore, if the fundamental curriculum framework teachers were expected to use was refocused to address maximum levels of competency (as opposed to minimum) then the nature of the content would be better suited to meet the needs of the gifted learner in the regular classroom. An example of where this has been done effectively is notably the Advanced Placement program (AP). The AP exams strongly influence instruction, in part, because they are tied to a prescribed curriculum and readings. The exams are taken seriously by most students and teachers, partly because the scores count for college entrance as well as college course taking. An alternative to having core curriculum aimed at maximum
levels of competencies would be for policymakers to consider a separate set of standards aimed for higher end learners.

Secondly, state and local policies need to be flexible in terms of the attainment of the existing set of standards. In order to address the competencies of gifted learners, policymakers should allow students to “test out” of courses, or exit from program options based upon proficiency evidence. If students could demonstrate mastery or state competency levels based upon students readiness levels and not dependent upon the specific grade level or content area that their placement is in; this may allow gifted students’ wider program options, even beyond what the school is able to provide. Due to the pressure that teachers feel to comply with state testing requirements, policymakers would do well to reconsider more flexible options in order to meet state imposed accountability requirements, thus allowing local school districts the ability to more accurately respond to their gifted learners.

Policymakers should attend to coherent and systemic strategies of reform; simply aligning a curriculum framework with tests is not enough. There should be a coordination of state reform efforts resulting in similar goals, and ensuring support for changes in teachers’ knowledge, available resources, and research-based goals for educational changes.

Analyses from this study have focused on North Carolina and have not been generalized to other states or to the greater field of gifted education. Although this researcher cannot generalize the study’s findings because this study was contextually bound, it is important to consider implications, which may relate to the broader field of gifted education and specifically, policy implications for gifted education. Policymakers
in gifted should consider in what ways gifted education should be embedded within
genral education and how it should be embedded within special education. A clearer
delineation between which areas in gifted education should be under the jurisdiction of
genral or special education, may assist local school districts in earmarking funds,
providing professional development efforts, and delivering services in order to create a
more coherent reform agenda linking policy to policy implementation.

Additionally, policymakers should consider more flexible approaches to
administering state assessments. Students should be allowed, if the student is able, to test
off grade level (e.g., a 5th grader taking the 7th grade end-of-grade mathematics test) and
credit should be given to those students showing proficiency on the test, regardless of
whether the students are in the grade level that the assessment is designed to test or not.

Finally, policymakers should attend to the relationship between embedded contexts of
teaching, because only when program development is done at both the individual and
collective levels will state-initiated reform efforts impact local gifted programs in ways
that will result in positive educational change.

Practice implications

Professional development, while continuing focused sessions on the characteristics of
gifted and differentiating instruction, should attend to the relationship between providing
services to gifted students and preparing students for the state testing of the EOG’s and
EOC’s. Practice implications would include those mechanisms which interface between
testing mandates and the classroom. Implications include the role of curriculum
materials, the role of staff development for administrators on what differentiating
instruction looks like in the classroom and monitoring services for gifted students, the role of teacher networks, and the role of students' readiness levels.

Secondly, professional development needs to occur with the gifted specialist in the evolving role as the consultative resource. This role has implications for administrative responsibilities rather than direct teaching and assumes a body of knowledge about curriculum development, instructional techniques, and resources that may or may not be part of the individual's background and training.

The coordination of services across levels of schooling, while allowing for the flexibility of the gifted learner, should be systematically applied across grades and schools in order to ensure a continuity of accelerated and enriched educational experiences for gifted learners. A shoring up of services across grade levels and schools would enable school districts to focus energy on collective program goals rather than individual student goals. This study's findings suggested that areas in services to be improved were specialized needs, such as gifted/learning disabled students or needed broadening, such as adding a K-2 component. School districts could emphasize best practices for curricular and program decisions for the gifted. Top-down support structures such as district level administrators, with bottom-up teacher involvement and commitment, would increase the likelihood for sustained changes over time. Findings from this study suggested that changes in school districts that resulted from a blend of stakeholder involvement perceived better integration of the gifted program within the overall school district.
The implementation of Article 9B has provided North Carolina a unique opportunity to consider in what ways operationalizing a local gifted program has implications for student programming, personnel roles, and sustaining meaningful educational changes in the context of state accountability reform initiatives. To date, it is too early to determine whether the changes made will sustain over time. Only through continued monitoring and subsequent program changes will the integrity and intent of Article 9B be fully realized.
References


Appendix A

ARTICLE 9B.

Academically or Intellectually Gifted Students.

"§115C-150.5. Academically or intellectually gifted students.

The General Assembly believes the public schools should challenge all students to aim for academic excellence and that academically or intellectually gifted students perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experience, or environment. Academically or intellectually gifted students exhibit high performance capability in intellectual areas, specific academic fields, or in both intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor.

"§115C-150.6. State Board of Education responsibilities.

In order to implement this Article, the State Board of Education shall:

(1) Develop and disseminate guidelines for developing local plans under G.S. 115C-150.7(a). These guidelines should address identification procedures, differentiated curriculum, integrated services, staff development, program evaluation methods, and any other information the State Board considers necessary or appropriate."
(2) Provide ongoing technical assistance to the local school administrative units in the development, implementation, and evaluation of their local plans under G.S. 115C-150.7.

§115C-150.7. Local plans.

(a) Each local board of education shall develop a local plan designed to identify and establish a procedure for providing appropriate educational services to each academically or intellectually gifted student. The board shall include parents, the school community, representatives of the community, and others in the development of this plan. The plan may be developed by or in conjunction with other committees.

(b) Each plan shall include the following components:

(1) Screening, identification, and placement procedures that allow for the identification of specific educational needs and for the assignment of academically or intellectually gifted students to appropriate services.

(2) A clear statement of the program to be offered that includes different types of services provided in a variety of settings to meet the diversity of identified academically or intellectually gifted students.

(3) Measurable objectives for the various services that align with core curriculum and a method to evaluate the plan and the services offered.

The evaluation shall focus on improved student performance.

(4) Professional development clearly matched to the goals and objectives of the plan, the needs of the staff providing services to academically or intellectually gifted students, the services offered, and the curricular modifications.

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(5) A plan to involve the school community, parents, and representatives of
the local community in the ongoing implementation of the local plan,
monitoring of the local plan, and integration of educational services for
academically or intellectually gifted students into the total school
program. This should include a public information component.

(6) The name and role description of the person responsible for
implementation of the plan.

(7) A procedure to resolve disagreements between parents or guardians
and the local school administrative unit when a child is not identified as
an academically or intellectually gifted student or concerning the
appropriateness of services offered to the academically or intellectually
gifted student.

(8) Any other information the local board considers necessary or
appropriate to implement this Article or to improve the educational
performance of academically or intellectually gifted students.

(c) Upon its approval of the plan developed under this section, the local board
shall submit the plan to the State Board of Education for its review and comments. The
local board shall consider the comments it receives from the State Board before it
implements the plan.

(d) A plan shall remain in effect for no more than three years; however, the local
board may amend the plan as it considers necessary or appropriate. Any changes to
a plan shall be submitted to the State Board of Education for its review and comments.
Institutional Environment: Subject Matter Cultures, Educational Goals and Norms of Practice, Reform Initiatives

Local Professional Contexts: Associations, Collaboratives, Alliances, Networks, Teacher Education Programs

Higher Educational Institutions: Standards for Admission and Student Achievement

Parent Community/Social Class Culture

School Sector/System

School Organization

Subject Area/Department

Class: Subject and Student
Local Gifted Program Survey

I. Demographic Information:
A. Position: ____________________
B. Number of years in current position: ________________
C. Number of years in school district: ____________
D. Number of years in education: _______
E. Are you a full time gifted coordinator?  Yes  No
If no, what other roles do you have in your school district? ________________________________________
F. Size of school district: (1) # of schools: ______________(2) # of students ______________
G. Type of school district (circle): Suburban Urban Rural
H. Total number (#) and/or % of students on free and/or reduced lunch: # ________  % ________
I. Was your school district selected as one of the original 9 “model sites” for gifted education
   yes  no (V check)

II. Current gifted program
A. Check (V only one) which school year you began implementing Article 9B (local gifted plan):
   ______ 1996-97
   ______ 1997-98
   ______ 1998-99
   ______ 1999-2000
B. Does your school district have in place screening, identification, and placement procedures for your
   academically and/or intellectually gifted students? 
   ______ Yes  ______ No (V check)
C. Indicate (V check any that apply) which support structures for implementing a local plan for gifted
   education you use:
   ______ administrative support (school level)
   ______ administrative support (district level)
   ______ other school districts’ coordinators’ support
   ______ some teachers implement our local plan
   ______ system-wide teacher implementation of plan
   ______ higher education assistance
   ______ state department support
   ______ strong staff development
   ______ local political philosophy
   ______ differentiated curriculum
   ______ parental support/network
   ______ specific budget
   ______ Other: ____________________________________________
D. Indicate (V check any that apply) which barriers you experience in implementing a local plan for
   gifted education:
   ______ administrative (school level)
   ______ administrative (district level)
   ______ decisions made hastily
   ______ limited staff development
   ______ lack of parental network
   ______ lack of teachers’ capacity to change in order to implement our local plan
   ______ state department
   ______ local political philosophy
   ______ limited staff development
   ______ no specific budget
   ______ lack of differentiated curriculum
   ______ other: ____________________________________________

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E. Within the school district's local plan for gifted, list (if provided) the identifiable services for gifted students at all grade levels and indicate how many years each service has been in place:

*A CODE SHEET (ATTACHED) IS PROVIDED FOR YOU TO ASSIST IN IDENTIFYING SERVICES. PLEASE REFER TO CODE SHEET FOR TYPE OF SERVICE*

<table>
<thead>
<tr>
<th>GRADE LEVEL</th>
<th>TYPE OF SERVICE (use attached code sheet)</th>
<th>HOW MANY YEARS HAS THIS SERVICE BEEN IN PLACE?</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Learning Environment (LE): List code(s):</td>
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<td></td>
<td>Program Interventions (PI) List code(s):</td>
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<td>Content Modifications (CM) List code(s):</td>
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<td>12</td>
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</tbody>
</table>

F. Do you have measurable objectives for your stated (above) gifted services?  
   _____ yes  _____ no  _____ we have some stated objectives

G. Do you have a method to evaluate your local gifted plan based upon improved student performance?  
   _____ yes  _____ no  _____ we evaluate certain components of our local gifted plan

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The College of William and Mary
H. Do you provide professional development based upon your local gifted plan?
   ______ yes    ______ no

   If yes, how many professional development sessions have you conducted since implementing your
   local plan ? _________(#) Check (√ any that apply) the focus of the professional developments:
   ______ curriculum differentiation    ______ social/emotional needs
   ______ characteristics of gifted learners    ______ assessment
   ______ identification using multiple criteria    ______ special populations
   ______ other: __________________________________________________

I. Check (√) below any members in your community whom you involve to help you implement your local
   plan:
   ______ parents    ______ students
   ______ central office personnel    ______ at-large community members
   ______ other: describe: __________________________

J. Check (√) the ways you disseminate information about your local plan:
   ______ newsletters    ______ end-of-the-year report grade to community
   ______ through conferences (i.e. parent/teacher)    ______ through annual meetings
   ______ other: please explain __________________________

K. Do you have in place due process procedures for resolving disagreements related to identification
   and/or placement decisions?
   ______ yes    ______ no

L. Which statement comes closest to your belief about your school system’s services to gifted students
   (√ check only one)
   ______ We have completely changed the way we serve gifted students since implementing our local
   gifted plan.
   ______ We really haven’t changed the way we serve gifted students since implementing our local gifted
   plan.
   ______ In some ways we have changed, and in other ways we haven’t changed the way we serve gifted
   students since implementing our local gifted plan.

M. Which statement comes closest to your belief the impact of your local plan for gifted on the overall
   school system (√ check only one).
   ______ Having a local plan for gifted has significantly impacted our overall school system.
   ______ Having a local plan for gifted has had no impact on our overall school system
   ______ Having a local plan for gifted has had some impact on our overall school system.

N. The main reason we are able to implement our local plan for gifted is because (fill in the blank)
   __________________________

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The College of William and Mary
Spring, 2000
III. State-initiated school reform activities (Gifted)

A. In your opinion, what are the three most powerful forces affecting the delivery of gifted education services in your state within the last three years? Rank them 1, 2, and 3 respectively, (1 = most powerful, 2 = 2nd most powerful, 3 = 3rd most powerful)

1. Middle school reform
2. Change in state funding for education
3. Change in state funding for gifted education
4. Change in state regulation (Article 9b) requiring local plans for gifted
5. ABC's (accountability, basics, local control)
6. Site-based management decision making
7. Standard Course of Study
8. End-of-Grade and End-of-Course testing
9. National reports (i.e. Third International Mathematics & Science Study; TIMSS, or National Excellence: A case for developing America's Talent)
10. Parental demands for more or improved services
11. Political philosophy of my school district
12. Other (please specify): ______________________________________

B. In your opinion, what are the three areas in your current local gifted program, most affected by state-initiated school reform efforts? Rank them 1, 2, and 3 respectively:

1. Representation of culturally diverse students in the gifted program
2. Funding for gifted education
3. Professional training for general education teachers that provide GT instruction
4. An identified individual in the administrative leadership of the school system in charge of the local gifted program
5. Assessing academic growth in students
6. Mastery of subject area disciplines among teachers of the gifted
7. More teachers endorsed in gifted education
8. Adoption of challenging and/or differentiated curriculum
9. Professional training for all administrative personnel
10. Off-level testing to assess gifted students' academic growth
11. Expanded services to more grade levels
12. Increased areas of giftedness being served (e.g. music, science, etc.)
13. Other (please specify): _______________________________________

C. In your opinion, what are the three areas of gifted education that are in greatest need of attention, in order for gifted education services in your school system to be optimal? Rank them 1, 2, and 3:

1. Representation of culturally diverse students in the gifted program
2. Funding for gifted education
3. Professional training for general education teachers that provide GT instruction
4. An identified individual in the administrative leadership of the school system in charge of the local gifted program
5. Assessing academic growth in students
6. Mastery of subject area disciplines among teachers of the gifted
7. More teachers endorsed in gifted education
8. Adoption of challenging and/or differentiated curriculum
9. Professional training for all administrative personnel
10. Off-level testing to assess gifted students' academic growth
11. Expanded services to more grade levels
12. Increased areas of giftedness being served (e.g. music, science, etc.)
13. Other (please specify): _______________________________________
D. Check (✓) any general school reform efforts that your local school system is involved in implementing system-wide:

- Cooperative learning
- Middle school concept
- Alternative assessment
- Reduced class size
- Site-based management
- Whole language
- Increased graduation requirements
- Other:_________________________________

E. Check (✓) specific school reform projects that your local school system is involved in implementing system-wide:

- Accelerated schools
- Reading Recovery
- Multiple Intelligences
- Block scheduling
- Smart Start
- I.B. (International Baccalurate)
- Senior exit projects
- Other:_________________________________

F. In your opinion, which one (✓ check only one) of the following contexts has the greatest impact on raising academic standards for gifted learners?

- what occurs in the specific classroom
- the content or curriculum within the school
- the school culture
- admissions criteria for college
- the school system
- alliances among educators
- educational goals set by the state

IV. Educational change

A. In your opinion, to what extent is your gifted program integrated with your school system's other system-wide initiatives?

1 2 3 4 5
(not at all) (partially) (moderately) (strongly) (totally integrated)

B. In your opinion, to what extent has state school reform efforts detracted or assisted implementation of your local plan for gifted education?

1 2 3 4 5
(strongly detracted) (partially) (moderately) (strongly) (totally assisted)

C. In your opinion, to what extent has other local school reform efforts detracted or assisted implementation of your local plan for gifted education?

1 2 3 4 5
(strongly detracted) (partially) (moderately) (strongly) (totally assisted)

D. In your opinion, to what extent does your school system administration support any new educational initiative?

1 2 3 4 5
(no support) (partially) (moderately) (strongly) (support at the beginning, during, and end of initiative)

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The College of William and Mary
Spring, 2000
E. In what ways does your school system involve classroom teachers in the overall implementation of educational changes? ( ✓ check any that apply)

- System-wide curriculum committees
- Staff development training within our school system
- Through a survey or questionnaire to teachers
- Strategic planning for the school system
- Through feedback to their school principal
- Our teachers are only responsible for what occurs in their classroom.
- Other (please specify): ____________________________________

F. In your opinion, which one ( ✓ check only one) of the following contexts has the greatest impact for educational change with gifted learners?

- what occurs in the specific classroom
- the content or curriculum within the school
- the school culture
- the school system
- the parents/or community
- admissions criteria for college
- alliances among educators
- educational goals set by the state

G. I would characterize the way educational change occurs in my school system the following way: ( ✓ check only one)

- Changes occur top-down.
- Changes occur bottom-up.
- Changes occur as a mix of top-down and bottom-up.

H. Please add any other comments BELOW that would clarify any of your responses:

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The College of William and Mary
Spring, 2000
**CODE SHEET FOR IDENTIFYING SERVICES IN USE WITH GIFTED LEARNERS**

**USE WITH QUESTION II.E on page 2:**

(1-13) LEARNING ENVIRONMENT (LE)
1. regular heterogeneous classroom
2. regular classroom with pull-out
3. regular classroom with cluster grouping
4. regular classroom with cluster grouping and pull-out
5. individualized education program (IEP) (with cluster and pull-out)
6. full-time self-contained gifted classroom
7. ability-grouped in specific subject (please identify subject area)
8. flexible grouping (grouping for subject area as needed)
9. cross-grade level (student advances to different grade level in specific subject area)
10. multi-age classroom
11. “center” program (students travel off-campus to receive services)
12. consultation (gifted specialist works with classroom teacher and/or students within classroom setting)
13. other: please identify

(1-9) PROGRAM INTERVENTIONS (PI)
1. Advanced Placement classes
2. International Baccalaureate
3. dual enrollment
4. mentorships or internships
5. grade advancement or early admission
6. group gifted students based upon a specific program model (e.g. Triad Enrichment Model, Multiple Intelligences, Talents Unlimited, etc.)
7. other: please identify

(1-9) CONTENT MODIFICATIONS (CM)
1. Individualized assignments/projects
2. Packaged curricula programs (e.g. Junior Great Books, Philosophy for Children, William & Mary Language Arts and/or Science Units, Great Explorations in Math & Science [GEMS], etc.)
3. continuous progress (moving through regular curriculum at own pace)
4. diagnostic/prescriptive or compacting (pre-assessment, “testing out” of already mastered curriculum, then being given appropriately challenging content work)
5. accelerated content (minimum one grade level above current grade level work)
6. integrating concept or theme into daily work
7. Student contracts
8. integrating competitions in daily classroom work (e.g. Odyssey of the Mind, Future Problem Solving, Model U.N., etc.)
9. Other: please identify
Appendix D

Telephone Interview and Focus Group Session Questions

1. To what extent do you perceive that the implementation of Article 9B (school district local gifted plan) has taken place?

2. How have service options for gifted learners changed since Article 9B has been implemented? Do you think that the year it was implemented has any bearing on the extent to which changes have been made in your gifted program?

3. Name up to three changes (to your local program) that have been most affected by Article 9B and why?

4. Describe any supporting factors for implementing a local plan for gifted education.

5. Describe any impeding factors for implementing a local plan for gifted education.

6. What state reform efforts (those efforts, policies, changes that state policymakers have put into place to raise standards) has most powerfully impacted your local gifted program and why?

7. Describe any areas in gifted education that need further attention for your program to be optimal.

8. Which of the following contexts do you think has the greatest impact for educational change with gifted learners?
   a. the classroom
   b. the curriculum (content)
   c. the school (culture)
   d. the school district
   e. the community/parents
   f. admissions criteria to colleges
   g. state advocacy groups for gifted or professional networks
   h. educational goals set by the state
## Appendix E

### Telephone Interview Responses

**Response by District Type (N=11)**

<table>
<thead>
<tr>
<th>Questions</th>
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<tbody>
<tr>
<td>To what extent do you perceive that the implementation of Article 9B has taken place?</td>
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<tr>
<td>Rural (N=5)</td>
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<tr>
<td>We’re on target. We have hit our benchmarks but we want to go beyond that.</td>
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<tr>
<td>Our plan has been designed and implemented over 3 years.</td>
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<td>It has taken place extensively throughout K-12.</td>
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<td>It’s not 100% implemented but there’s awareness that it needs to be.</td>
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<tr>
<td>We’re beginning our third year and we still have education needs for teachers and principals.</td>
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</table>

<table>
<thead>
<tr>
<th>How have service options for gifted learners changed since Article 9B has been implemented? Do you think the year has any bearing on the extent to which changes were made?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural (N=5)</td>
</tr>
<tr>
<td>Concentration now is on math and reading, no more frills. We just did everything all at once, because we had the sense to know that gifted education had to happen everyday in the classroom.</td>
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<tr>
<td>The plan didn’t change service options. For us, it was the middle school concept. It’s been a gradual saturation of awareness.</td>
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<tr>
<td>It caused our district to have services, otherwise it would have been business as usual.</td>
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</table>
usual.
* We used to concentrate in language arts, now it's math and language arts, K-12. We phased it in over 3 years.
* Services stayed the same, but our criteria is broader. We have teams of teachers working on things, like pacing guides to help implementation.

<table>
<thead>
<tr>
<th>Name up to 3 changes (to your local program) that have been most affected by Article 9B.</th>
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<tbody>
<tr>
<td>* Staff development, elimination of gateways for identification, and trying to have some type of curriculum for AG learners.</td>
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<tr>
<td>* Hiring a coordinator, establishing a county advisory board, and increased communication.</td>
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<tr>
<td>* Increased staff, expansion of program.</td>
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<tr>
<td>* Staff development, looking for gifted minorities, and organizing a parent group.</td>
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<tr>
<td>* Broader entrance criteria, and hiring extra teachers.</td>
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<tr>
<td>* We brought in so many people; parents, teachers, it helped get it broadly accepted, outline of delineated services, and staff development for all teachers.</td>
</tr>
<tr>
<td>* Pushing the responsibility for service on classroom teachers, hiring a coordinator, and moving out of exceptional children’s program (EC).</td>
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<tr>
<td>* Expanded services, articulated curriculum, and assessment of student outcomes.</td>
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<td>* Awareness of diverse populations-gifted minorities, early identification, and greater understanding that you're not gifted in everything.</td>
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<tr>
<td>* Staff development, changing attitudes, and separation of funding.</td>
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<tr>
<td>* Using a catalyst (consultative model) instead of pull-out, using Multiple Intelligences (MI) to address diversity issues, and considering special populations of gifted.</td>
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<table>
<thead>
<tr>
<th>Describe any supporting factors for implementing a local plan for gifted education.</th>
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<tbody>
<tr>
<td>* Superintendent, and central office, and network of other AG coordinators</td>
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<tr>
<td>* Advisory board and having a coordinator in charge</td>
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<td>* School board, and advisory council</td>
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<td>* Using a self-study and having model sites in the state to visit</td>
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<td>* Staff development, and involving multiple groups.</td>
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<td>* Accountability to our school board, and staff development</td>
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<td>* Community, board, and principal support</td>
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<td>* Central office, and personnel providing services</td>
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<td>* Parent involvement, and community support</td>
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<td>* Parent support, started changes in a few schools and then implemented in all, and central office administrative support</td>
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<td>Describe any impeding factors for implementing a local plan for gifted education.</td>
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<td>What state reform efforts have most impacted your local program?</td>
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<td>Describe areas that still need attention for your program to be optimal.</td>
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<td>Which educational context has the greatest impact on gifted learners?</td>
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Note:
- EOG/EOC-End-of-Grade (gr. 3-8), End-of-Course (gr. 9-12), state testing program
- ABC's- state reform effort standing for Accountability, Back-to-Basics, Local Control
- SCS-Standard Course of Study (EOG/EOC assess the standard course of study)
Appendix F

Focus group responses (N=5)

Response by Role

<table>
<thead>
<tr>
<th>Questions</th>
<th>Classroom teacher</th>
<th>School Principal</th>
<th>School system coordinator</th>
<th>Parent</th>
<th>Higher Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent do you perceive that the implementation of Article 9B has taken place?</td>
<td>Implemented on paper, disparity between schools as a result of parent pressure, extensive training</td>
<td>Fully implemented, extensive teacher training, differentiation for all learners</td>
<td>Awareness, teacher training, some schools doing better job than others due to school administrator</td>
<td>Initial excitement but has swung back towards original way of doing things</td>
<td>Local ownership, extensive teacher training throughout the state, restrictions on service array due to lack of funding</td>
</tr>
<tr>
<td>How have service options for gifted learners changed since Article 9B has been implemented? Do you think the year has any bearing on the extent to which changes were made?</td>
<td>Teachers writing differentiated curriculum units, no longer pull out-services have changed to classroom</td>
<td>Teacher endorsement system-wide, we use to group and now it is more individualistic</td>
<td>We changed from our TAG positions from serving students to being a resource for teachers</td>
<td>Ours was implemented early and there's now less emphasis and a tapering off of changes, more emphasis on testing</td>
<td>State awareness of different options, greater understanding of differing needs</td>
</tr>
<tr>
<td>Name up to 3 changes (to your local program) that have been most affected by Article 9B.</td>
<td>More endorsement and training of teachers, increased awareness, now part of school improvement plan</td>
<td>Effort to increase services, emphasis on classroom responsibility rather than district focus, better job of identification</td>
<td>Staff development, gifted specialist role has shifted, more focus on minority gifted</td>
<td>Funding cuts, conflicting options at HS level, increased awareness</td>
<td>Increased awareness of different options at all grade levels, personnel preparation, paradigm shift-gifted education is integral not separate</td>
</tr>
<tr>
<td>Describe any supporting factors for implementing a local plan for gifted education.</td>
<td>District level administrative support, school administrative support</td>
<td>School administration, teacher implementation, district level administration</td>
<td>Other AG coordinators, district level administration</td>
<td>District level administration, school level administration</td>
<td>School level administration, gifted “being at the table” in discussions local and state</td>
</tr>
<tr>
<td>Describe any impeding factors for implementing a local plan for gifted education.</td>
<td>Testing and the writing assessment</td>
<td>Teachers reluctance to change and school climate</td>
<td>Funding-initial funding never delivered and now, there are cuts</td>
<td>Parents who still need the gifted label</td>
<td>Funding, Trying to change thinking about gifted</td>
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<tr>
<td>Which state reforms efforts have most impacted your local program?</td>
<td>ABC’s, EOG’s</td>
<td>ABC’s, middle school concept</td>
<td>Technology, ABC’s, expense of natural disaster, state auditing</td>
<td>Testing, Expense of natural disaster</td>
<td>OCR, gap in achievement levels, distance learning</td>
</tr>
<tr>
<td>Describe areas that still need attention for your program to be optimal.</td>
<td>The gap between minority achievement and gifted</td>
<td>Still need to increase types of service option</td>
<td>K-2 component, social/emotional needs, parent education</td>
<td>Gifted/LD</td>
<td>Continued state and national advocacy for monies allocation</td>
</tr>
<tr>
<td>Which educational context has the greatest impact on gifted learners?</td>
<td>Curriculum/content</td>
<td>Split between the classroom and parent</td>
<td>Classroom</td>
<td>Parent with classroom</td>
<td>Classroom</td>
</tr>
</tbody>
</table>
Vita

Elissa Fern Weisner Brown

Birthdate:    April 10, 1958
Birthplace:  Patterson, New Jersey

Education:
1990-1992   Western Carolina University
            Cullowhee, NC
            Administration and Supervision Certificate

1986-1989   Western Carolina University
            Cullowhee, NC
            Masters of Education

1978-1980   University of Georgia
            Athens, GA.
            Bachelor of Science

1976-1978   University of Iowa
            Iowa City, IA.

Professional Experience:

1998-present Director (Principal) Chesapeake Bay Governor’s School
            Tappahannock, VA.

1996-1998   Center for Gifted Education
            Graduate Assistantship

1993-1996   Program Administrator for Gifted Education
            Burke County Public Schools, NC

1990-present National Educational Consultant